Gosport Borough Local Plan 2011-2029 Publication Version

Retail
Background Paper

June 2014

GOSPORT
Borough Council

Retail Background Paper

Contents

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1.0 INTRODUCTION

1.1 This document is a Background Paper to the Gosport Borough Local Plan 2011-2029 relating to retail and the Borough's shopping centres. The Background Paper sets out the relevant national and local policy context. It includes a summary of evidence and consultation responses to various issues related to retail and the Borough's principal, district and neighbourhood centres.

2.0 POLICY CONTEXT

National Policy

National Planning Policy Framework

2.1 In March 2012 the Government published the National Planning Policy Framework (NPPF). The NPPF sets out the Government's economic, environmental and social policies.

2.2 Securing economic growth is a key priority for the Government. Town and city centres have an important role in achieving this objective. The NPPF states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. It states that local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres and provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Planning proactively to drive and support sustainable economic development;
- Retain and enhance existing markets;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development need in town centres;
- Allocate appropriate edge of centre sites for main town centre uses that are well-connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified need in other accessible locations that are well connected to the town centre; and
- Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites.

2.3 The NPPF sets out two key tests that should be applied: the sequential test; and the impact test. Consequently these principles need to be included in local plan policies. Further guidance is set out in both the NPPF and the National Planning Practice Guidance (NPPG).

2.4 The NPPF states that local authorities should use its evidence base to assess the role and function of town centres and the relationship between them, including any trends in the performance of centres; and it should assess the capacity of existing centres to accommodate new town centre development.

National Guidance

National Planning Practice Guidance

2.5 The Government's NPPG provides supplementary guidance to the NPPF. The NPPG stresses the importance of a 'town centre first' approach. Local planning authorities should plan positively to support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive, diverse places where people want to live, visit and work.

2.6 As part of the positive approach local authorities should seek to improve the quality of parking in town centres. The guidance provides detailed advice on implementing the sequential and impact tests and outlines the importance of a town centre strategy.

Other guidance and relevant documents

Portas Review

2.7 There has been significant debate about the future of the High Street. The Portas Review (December 2011) examined the future of the High Street and put forward a number of recommendations for Government to consider. The Government put together a package of measures following on from the Portas Review recommendations including establishing Town Teams which have access to a wide range of specialist advice and support in order to help reinvigorate town centres. A Town Team was established in Gosport in July 2012. Responsibilities of the Gosport Town Team include overseeing the development and implementation of an Action Plan, and making decisions on the allocation of funds and resources to support its delivery. Further details about the Gosport Town Team can be found on the following website: http://www.gosporttowncentre.co.uk/

Recent Regulatory Changes

2.8 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013, allows for permitted development rights for change of use which included the temporary change of use of buildings within the range of A use classes, B1 and D1 and D2 uses for a single temporary period of up to 2 years and subject to a $150m^2$ size limit in order to assist economic growth and revitalisation of town centres. The new permitted development rights do not apply to listed buildings. Similarly there are recent amendments which allow A1 and A2 uses to convert to residential (C3) without planning permission if they are under 150 m^2 or not a listed building, within a Conservation Area as well as some other such limitations. A prior approval from the local planning authority is required to ensure that the proposed use is acceptable in terms of highways impact, contamination and flood risk and that the proposed use is undesirable due to it causing inadequate provision of A1 or A2 services or where the building is located in a key shopping area. Further changes to the Use Classes Order are currently being proposed in relation to bookmakers. The impact that this may have on the emerging Town Centre policies is considered in Section 5.

Sub Regional Context

South Hampshire Strategy (PUSH October 2012)

2.9 The South Hampshire Strategy has been approved by all the authorities that make up the Partnership for Urban South Hampshire (PUSH). The purposes of the Strategy are seen as:-

- assisting the PUSH ambition to create a prosperous economy in a sustainable way;
- providing a spatial framework for PUSH activities and actions including the allocation of resources, and provide a context/support to bid for external funds for projects;
- guiding and supporting the preparation of Local Development Framework/Local Plan and providing part of the underpinning evidence base;
- a means for PUSH authorities to discharge the 'duty to cooperate' with neighbouring authorities on planning issues with cross-boundary impacts which the Localism Act places on all local authorities;
- enabling PUSH authorities to show they are meeting development needs including dealing with development requirements which cannot wholly be met within one authority's area.

2.10 Policy 10 of the South Hampshire Strategy relates to retailing and town centres. The Strategy recognises that town centres are vital elements of the economy and a key focus for the community, providing for a mixture of uses including retail, cultural, leisure and tourism, business accommodation, service provision and residential.

2.11 The Strategy aims to broadly maintain the current retail hierarchy and for each centre to enhance its individual identity. The development of dynamic and successful city/town centres is central to the achievement of sustainable development in South Hampshire. The policy approach therefore favours city/town centres as the preferred location for retail development.

2.12 The most recent forecast is that 280,000 - 425,000 square metres of additional retail floorspace could be needed in South Hampshire between 2011 and 2026. That forecast was prepared in 2005, before the current recession and the closure of whole retail chains. Moreover, whilst the forecast assumed a growth in internet shopping, some analysts are now suggesting that the future significance of such e-tailing will be far greater. This points to a cautious approach to planning for future retail expansion especially outside city/town centres.

2.13 However, it is vital that there is provision for future expansion in South Hampshire's city/town centres, so that when the upturn does arrive, retail development is able to take place there and is not forced out-of-town by a lack of city/town centre sites. Given the long lead-in times for delivering central area schemes, it is necessary to plan now for expansion in the medium and longer term. As multiple land ownership is common in central areas, this will require PUSH authorities to, where necessary, assist with land assembly by using compulsory purchase powers.

2.14 With the exception of the North of Fareham Strategic Development Area (Welborne), no need has been identified for any new out-of-centre shopping centres or large-scale extensions to existing ones during the period to 2026.

The role and regeneration of town centres should not be undermined by an expansion of such development.

2.15 Overall the strategy for the town centres of South Hampshire is to enhance their individual character and complementary roles through: high quality mixed-use development including residential and hotel accommodation; improvements to the public realm and public transport interchange facilities; and improved pedestrian/cycle links from central areas to parks, open spaces and waterfront destinations. Portsmouth and Southampton are defined as Regional City Centres while Eastleigh and Fareham are defined as Large Town Centres. Major comparison goods retail developments and other town centre uses of a large scale, should be located in these centres. Gosport and Havant are Medium Town Centres serving a more limited catchment area. It recognises Gosport should develop opportunity sites for retail and office provision.

Local Policy

Gosport Borough Local Plan Review (2006)

2.16 The retail and town centres chapter establishes the retail hierarchy within the Borough. It makes a number of allocations for retail development that would be regarded as appropriate as part of mixed uses schemes at Gosport Bus Station, Royal Clarence Yard and Coldharbour (saved policy R/S1) which all form part of the waterfront and recognises the opportunities to strengthen links between the existing town centre and the strategic waterfront area.

2.17 The adopted Local Plan Review also identifies the current retail hierarchy this is set out below:

- 1 Principal Centre – Gosport Town Centre;
- 2 District Centres – Stoke Road and Lee-on-the-Solent;
- 5 Local Centres; and
- 17 Neighbourhood Centres.

2.18 There are also a number of smaller individual shops located throughout the Borough which primarily provide local residents with an opportunity to do top-up shopping.

Links with the Corporate Plan

2.19 The Corporate Plan identifies a number of ‘Strategic Priorities’, those most applicable to the retail policies are as follows:

- Regenerating Gosport’s Town Centre and Waterfront.
- Promoting health and well-being.
- Improving leisure opportunities and facilities.
- Reducing crime and anti-social behaviour.
- Maximising local employment opportunities; and
- Improving social inclusion.

3.0 EVIDENCE

Part 1: Town Centre Health Checks

3.1 One of the key evidence sources when devising retail and town centre policies for the Local Plan are the variety of qualitative and quantitative indicators that comprise a 'health check' for each of the centres. This is largely provided by on-going monitoring by the Borough Council, some of which included in the Council's Annual Monitoring Report. The Health Check information for the larger centres also includes data and observations by GVA as part of the Gosport Retail Capacity Study (2014). Detailed analysis of the proportion of uses within each centre is included in Appendix 1 in order to provide background evidence for the Borough Council's emerging retail frontage policy. Appendix 2 and 3 includes a review of the boundaries of centres together with corresponding maps of the proposed changes.

<u>Gosport Town Centre</u>

3.2 Gosport Town Centre is the Borough's principal centre and is situated on the southern tip of the Peninsula adjacent the western side of Portsmouth harbour overlooking the Historic Dockyard and the Spinnaker Tower. It provides the focus for a variety of convenience and comparison retailing and other town centre services in the Borough.

3.3 The centre consists of a traditional linear High Street on an east-west axis with a mix of historic, purpose-built and converted retail properties. It has an attractive pedestrianised shopping environment and is within close proximity to the neighbouring key open spaces of Walpole Park and Falkland Gardens. The centre plays an important role as the economic, social and civic focus of the Borough with the Council offices and Discovery Centre (which includes library, local history centre, and exhibition space).

3.4 Gosport's retail offer is almost exclusively confined to the pedestrianized, linear High Street which extends from the ferry pontoon at the Harbour to the Morrisons supermarket on Walpole Road. There are also a few shops on North Cross Street, Bemister's Lane and a under-utilised precinct on South Cross Street. The town has a twice-weekly market on Tuesdays and Saturdays which is particularly strong on a Saturday.

3.5 The Town Centre is located close to the Gosport Waterfront regeneration area and there is the opportunity to promote mixed use developments which could support and complement the Town Centre. Therefore the two areas require visual and physical linkages. There are opportunities to develop an evening economy linked to the development of the Gosport Waterfront. There could be scope for Gosport to develop its evening economy, complementing the activities across the Harbour.

3.6 The Retail Capacity Study recognises that the Town Centre has a number of environmental qualities including its proximity to Portsmouth Harbour with an attractive waterfront walk running to the Explosion and Submarine Museums. It states that the Town Centre is relatively compact and the comprehensive pedestrianisation of the wide High Street provides a safe and pleasant town centre environment with a variety of building styles including a number of listed buildings. The Study states that litter and graffiti do not appear to be a cause for concern. There are a number of recent improvements to the Town Centre as a result of several Town Team initiatives working in partnership with the Borough Council and Hampshire County Council. These include:

- A scheme to improve the appearance of the pedestrianised area providing high quality and durable street furniture with totem maps, and removal of previous street clutter;
- attractive boards show key sites and interest features around the town to brighten up dead frontage;
- a successful grant scheme to encourage the re-let of a number of vacant properties.

3.7 The centre is well-served by the ferry/bus station interchange with ample long and short stay car parking in and around the centre. It has plenty of cycle parking and fairly good pedestrian routes. The weakness in terms of accessibility is the wider road network across the Peninsula, although the Bus Rapid Transit has improved bus accessibility to the Town Centre.

3.8 The 2014 Gosport Retail Capacity Study (GVA 2014) considers that the Town Centre has a total of 29,005 m^2 gross floorspace with 161 units. Key points are outlined below with more detailed analysis and data contained in the GVA Report and its accompanying appendices.

3.9 The Report states that overall the health check indicates that Gosport continues to perform well against the national average in a number of key indicators. The scale of convenience and comparison goods provision in the centre is at or above the national average. Notwithstanding this, the results of the household survey indicate that there is a perceived lack of choice and range of offer for both convenience and comparison goods in the centre.

3.10 In terms of convenience, the Morrisons store with a strong in-store offer is the largest store in the Centre. It is a key attractor to the town centre offering linked trips between the store and the town centre. 30% of those that carried out their main shopping at the store also linked their trip with a visit to the rest of the town centre. It accounts for 9.7% of total convenience expenditure across the study area although this is lower than the 14.2% achieved across the same area in 2007.

3.11 The comparison retail offer has remained stable between 2007 and 2014 despite this period coinciding with the economic crisis. The comparison retail offer is predominately tailored towards the lower/mass market with a number of national comparison retailers. The Centre is well-represented with charity shops and below average representation of DIY and furniture stores. The household survey indicates that Gosport Town Centre retains 34.8% of comparison goods expenditure from within the survey area. This is a significant increase from the 25% market share in 2007.

3.12 According to the Goad Report (Nov 2012) the number of vacant units (14) was 8.7% of the total units in the centre which is significantly below the national average of 12.8%. The Borough Council's more recent data (February 2014) identifies a further fall in vacancy rates with:

- Number of units: 8.2% vacant
- Length of frontage: 5.2% vacant
- Floorspace: 4.8% vacant

3.13 Vacant units are generally small in size and scattered across the centre, albeit there appears to be a growing cluster at the Precinct, on South Cross Street.

3.14 The Study identifies that there are 65 national chains in the centre, which is down from 76 identified in 2007. There appears to be only two retailers currently showing an interest in locating to Gosport Town Centre compared with 22 recorded in 2007. This trend is not specific to Gosport, although highlights that the centre may have difficulties attracting new retailers to the local market. Since the onset of the recession, many retailers have significantly scaled back their expansion plans and as a result more retail destinations are competing for investment.

3.15 The scale of leisure provision in the centre is below the national average. Improvements in the choice and variety of facilities could help improve this and potentially improve the level and frequency of residents who visit the Town Centre in the evening.

Lee-on-the-Solent District Centre

3.16 The centre is approximately 4.5 miles west of Gosport Town Centre and is based around a traditional linear High Street and forms part of the Conservation Area. The High Street is a one-way road and there is on-street parking on one side of the street and several pay and display surface car parks along the seafront.

3.17 The Centre has 10,683 m^2 floorspace with 89 outlets. It has slightly higher proportion of convenience and comparison stores than the national average and significantly lower than the average number of vacant units, with 2.2% vacant units compared to the national average of 12.8%. In terms of frontage 3.5% is vacant and in terms of floorspace 2.5% is vacant (Feb 2014).

3.18 There are a number of independent stores including a baker, bookshop, two butchers, a fishmonger and an off-licence. There are also some national stores including Co-Op, Tesco, Boots, Subway as well as a number of financial institutions.

3.19 The Tesco store is a recent development and located on the edge of centre and it is now proposed to include this store within the centre boundary.

3.20 Overall the GVA Report assessment suggests that Lee-on-the-Solent is a busy and popular centre with a range of retail and service operators meeting day-to-day shopping requirements. The Study concludes that the centre would benefit from improved linkages between the High Street and to the seafront to encourage more visitors to use the High Street shops. There is also scope to enhance convenience goods provision in order to claw back expenditure lost to other destinations.

Stoke Road District Centre

3.21 Stoke Road is located immediately west of Gosport Town Centre. There is 17,213m2 of floorspace (gross) across the centre with 124 units. It has a lower convenience and comparison offer than the national average and a greater level of units providing a variety of services.

3.22 According to the Borough Council latest survey (Feb 2014) 12.4% of the units are vacant, 14.4% of the frontage and 16.2% of the floorspace. This ongoing trend of high vacancies makes Stoke Road a particularly vulnerable centre and detracts from the quality of the appearance of the centre. There appears to be no published requirements for retail representation in Stoke Road.

3.23 The centre has a Waitrose store which anchors the centre and serves an important role in creating linked trips with 20% of respondents stating that they combine their main food shop with other goods and services in the centre.

3.24 Overall Stoke Road provides a wide mix of services and facilities to serve their local populations but remains vulnerable due to high vacancy rates.

Other Centres

3.25 The GVA Report concludes that the Borough has a strong network of local centres which are generally in good health and provide important retail and services for everyday local needs and that this should be maintained. Further details of uses and vacancy rates are contained in the Borough Council's Annual Monitoring Report.

Part 2: Current supply of retail floorspace

3.26 Table 1 sets out the current supply of new retail floorspace (net sales area) since 2011

Table 1: Retail floorspace supply (as 1st April 2014)[1] estimated net sales retail floorspace m^2)

	Retail floorspace (net sales) (m^2.)
Completions (1/4/11-31/3/14)	**3,675[2]**
Existing permission:	
Aldi[3], Gosport Waterfront	1,181
ASDA extension, Dock Road	788
Daedalus[4]	200
Other permissions[5]	197
Sub Total	**2,366**
Estimate within mixed use allocations:	
Haslar[6]	340
Sub total	**340**
Total currently identified	**6,381[7]**

3.27 Further details on the completions, allocations and permissions are contained in Appendix 4.

[1] But also includes major retail planning approvals between 1st April 2014- 1st June 2014
[2] Include 1,397 m^2 net retail sales area at Royal Clarence Yard which has consent for unspecified A1-A5
[3] Planning consent granted in principle after April 2014 subject to S106 Agreement.
[4] A maximum of 200 m^2 would be A1.
[5] 113-117 Elson Road
[6] The Local Plan allocates the Haslar site as a care-led mixed use site which could include a small element of supporting retail. The latest planning application (to be determined) has a proposal for 340 m^2
[7] This could be viewed as a range of 4,984-6,381s $m^2$when taking account of the RCY completions

Part 3: Future quantum and location of retail floorspace

3.28 Evidence used for the retail part of the spatial strategy includes:

- South Hampshire Town Centres Sub Regional Study Volumes 1-3 (DTZ March 2006);
- Gosport Retail Capacity Study 2014 (GVA April 2014)

<u>Sub Regional requirements</u>

3.29 The South Hampshire Strategy agreed by PUSH outlines the strategy for main town centres. It is based on the development of dynamic and successful city/town centres favouring such locations for new retail development.

3.30 In the initial South Hampshire Strategy (included in the revoked South East Plan (2009)) PUSH identified the need for retail and other key town centre uses for the sub region (Table 2). These are mid-range estimates for long-term sub-regional planning purposes. The strategy recognises that more detailed appraisals should be carried out as part of the LDF evidence.

Table 2: Sub Regional requirements for town centre uses

Net floorspace needed	Comparison retail (High Street format)	Food & Drink (A3, A4, A5)
2005/06-2011	57,000-86,000 m^2	11,000-26,000 m^2
2005/06-2016	137,000-206,000 m^2	27,000-62,000 m^2
2005/06-2021	231,000-346,000 m^2	46,000-104,000 m^2
2005/06-2026	**340,000 -511,000** m^2	**68,000-153,000** m^2

Source: South Hampshire Town Centres Sub-Regional Study Volumes 1-3 (DTZ March 2006).

3.31 When refreshing the Strategy in 2012 it has been acknowledged that these forecasts were prepared before the recession and that there have been closures of numerous stores including a number of household names. Moreover whilst the forecast assumed a growth in internet shopping some analysts are suggesting that the future of e-retailing will be far greater. Consequently these forecasts must be used with caution when planning for future retail expansion especially outside town and city centres. However the latest PUSH Strategy recognises that it is vital that there is provision for future expansion in South Hampshire centre, so that when the upturn does occur retail development is able to take place in town centre sites and not be forced out of town.

<u>Quantitative Needs Assessment for Gosport Borough</u>

3.32 The Gosport Retail Capacity Study (GVA 2014) sets out the potential quantitative retail need for additional retail floorspace in the Borough which has helped in form the quantum set out in the Spatial Strategy Policy (LP3) of the emerging Local Plan.

Expenditure growth rates

3.33 Based on various assumptions which are detailed in the GVA Study it has been possible to estimate the available expenditure in the survey area. These are identified below (Tables 3a-3c):

Table 3a: Convenience goods

Year	Growth rate in retail expenditure
2012-2013	-0.6% pa
2013-2014	-0.3% pa
2014-2015	0.1%pa
2016 onwards	0.8%pa

Table 3b: Non-bulky comparison goods

Year	Growth rate in retail expenditure
2012-2013	3.1% pa
2013-2014	2.5% pa
2014-2015	2.7% pa
2016-2020	2.9% pa
2021 onwards	2.8% pa

Table 3c: Bulky comparison goods

Year	Growth rate in retail expenditure
2012-2013	3.5% pa
2013-2014	1.8% pa
2014-2015	2.9% pa
2016 onwards	3.1% pa

3.34 These growth rates reflect that spending on comparison goods will grow faster than convenience goods as the scope to buy more food is limited. These assumptions take into account current economic circumstances and the effects of the recession.

Available expenditure

3.35 The GVA study calculates the total available expenditure within the Gosport Borough area over the Plan period (Table 4). These projections should be treated to caution due to the potential for changing economic circumstances and the susceptibility of longer-term forecasts to margins of error.

Table 4: Total available retail expenditure within Gosport Borough

	Available expenditure in Gosport Borough area				Growth over the period 2014-2029
	2014	2019	2024	2029	
Convenience	£158.4m	£162.5m	£168.5m	£175.8m	£17.4m (11% growth)
Non-bulky comparison	£164.8m	£183.4m	£209.9m	£242.9m	£78.1m (47.4%growth)
Bulky comparison	£59.7m	£67.1m	£77.9m	£91.4m	£31.7m (53.1%growth)

Convenience goods: Current market share

3.36 The Study includes an analysis for additional convenience floorspace over the plan period. Table 5 below provides a summary of existing market shares attributed to the main destinations and the overall retention of convenience goods expenditure within the Borough and compares this with the earlier 2007 retail study.

Table 5: Convenience expenditure market shares between 2007 and 2014 (%)

	Gosport Study Area Zones (1-4)		
	2007	2014	Change
Gosport Town Centre	16.5%	11.9%	-4.6%
Stoke Road District Centre	5.5%	4.4%	-1.1%
Lee-on-the-Solent District Centre	2.6%	2.8%	+0.2%
Neighbourhood Centres	3.3%	16.5%	+13.2%
Out-of Centre destinations	31.4%	40.6%	+9.2%
Total inside Borough (Retention)	**59.3%**	**76.2%**	**+16.9%**
Total outside Borough (Leakage)	**40.7%**	**23.8%**	**-16.9%**

3.37 Identified important factors in the increased level of retention of convenience expenditure include:

- The opening of the Tesco in Alver Village as part of the Rowner Regeneration Area which has helped significantly increase the market share of Neighbourhood Centres;
- Improvements to out-of centre stores such as the Asda on Dock Road (which has the largest market share of any individual store).

3.38 Gosport Town Centre has experienced the largest decrease in market share when comparing types of destinations within the Borough.

Convenience goods capacity projections

3.39 According to the GVA Study based on combined and current market share of the main convenience destinations in Gosport, it is considered that there is no surplus capacity to support new convenience floorspace in the Borough across the Plan period. This is assuming maintaining a constant market share approach. This is due to ‘undertrading’ of existing floorspace in the Borough and the theoretical capacity that existing stores have, to fulfil any increase need arising from population and expenditure growth.

3.40 The Study however states that there may be qualitative reasons to support a new convenience retailer in the Lee-on-the-Solent District Centre in order to increase the retention of convenience expenditure in the local area. However it is important to note that this should be concentrated in the centre itself or on its immediate edge rather than sites such as Daedalus. Advice from GVA states that a small convenience store of about 200m^2 is likely to be acceptable at Daedalus to serve the needs of new residential and employment communities without significantly adversely affecting the vitality and viability of Lee-on-the Solent District Centre.

3.41 Elsewhere in the Borough there may be a qualitative case to support additional convenience provision including improvements to the quality and choice of provision within Gosport Town Centre and/or assisting with wider regeneration proposals with the Town Centre/Waterfront area. It is considered that proposals will take place in town centre locations and that these will contribute to linked trips to other trade and services and claw-back trade from out-of centre location.

Comparison goods: Current market share

3.42 Table 6 below provides a summary of existing market shares attributed to the main destinations and the overall retention of comparison goods expenditure within the Borough and compares this with the earlier 2007 retail study.

Table 6: Comparison expenditure market shares between 2007 and 2014 (%)

	Gosport Study Area Zones (1-4)		
	2007	2014	Change
Gosport Town Centre	25%	37.1%	+12.1%
District and Neighbourhood Centres	-	0.6%	+0.6%
Out-of Centre destinations	-	1.7%	+1.7%
Total inside Borough (Retention)	**25%**	**39.4%**	**+14.4%**
Total outside Borough (Leakage)	**75%**	**60.6%**	**-14.4%**

3.43 Comparison expenditure retention inside the Borough has increased by around 50% since 2007 and the market share has increased by 14.4% points. The high level of leakage, although much improved, largely reflects Gosport's position in the sub-regional retail hierarchy. However there is scope to improve this market share over the Plan period.

3.44 The increase in market share is primarily driven by the increased market share achieved by Gosport Town Centre. There has not been any significant increase in comparison goods floorspace in the Borough since 2007 so the reason for this increase is unclear. The Report adds that this period has coincided with a deep economic recession and it may be that this increase can be related to changes in price-based shopping habits which relates well to retail provision in Gosport Town Centre. The Centre achieves a 40.9% market share of non-bulky comparison goods expenditure and 17.9% for bulky comparison goods expenditure.

Comparison goods capacity projections

3.45 Based on combined turnover and current market share of existing comparison goods destinations in Gosport Borough, the GVA assessment concludes that there will be £0.3m of surplus capacity to support new comparison goods floorspace in the Borough by 2016. This is expected to grow to around £4.5m by 2022, reaching £13.3m by 2029. Based on current market shares it is considered that there is a capacity for only 56 m^2 of comparison goods floorspace by 2016 growing to 1,817 m^2 by 2029.

3.46 The Report adds that new floorspace should be directed to Gosport Town Centre as a priority, however this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs and qualitatively improves the vitality and viability of these centres. However in practice it is considered that opportunities and demand in these centres will be limited.

3.47 Importantly, the Report adds that whilst Gosport will always lose trade to competing higher order centres it is considered reasonable to aspire to achieving an increase in the Borough-wide retention. Although the scale of uplift achievable will be inherently dependent upon the nature of any development proposals it is considered that it could be feasible to increase the retention rate from 37% to 45%. As a result of this work, all other assumptions being equal it is considered that the Borough could support 3,174 m^2 net of comparison goods floorspace by 2016, growing to 5,365 m^2 (net) by 2029.

3.48 Again the scale of uplift achievable will depend on the scale, form and market positioning of any new development which comes forward, Clearly a very large, high quality scheme attracting anchor stores and retailers currently not represented in Gosport would have the potential to 'claw back' much more trade than a scheme which largely replicates the current offer. Additional new floorspace over and above these aspirational figures could be supported provided the new development is of sufficient scale/quality and is effectively integrated and subject to consideration of the potential impact on other parts of the centre.

3.49 Based on this evidence the Borough Council's consideration of an overall floorspace figure for the Borough is detailed in the 'Issues Addressed by the Local Plan' section below (section 5).

4.0 CONSULTATION

Main Consultations to date including:
• Consultation at each plan-making stage: - Gosport Borough Local Plan 2011-2029: Consultation Draft (Dec 2012- Feb 2013); - Core Strategy : Preferred Options (GBC December 2009); - Core Strategy: Issues and Option (GBC December 2006); - The Community Strategy and Local Development Framework: Make Your Mark December 2006 events (held in December 2006 Gosport Partnership); and • Gosport Waterfront (Stage 2.5): Consultation Report (Colin Buchanan April 2010) • On-going meetings with key stakeholders

4.1 Whilst there have been a number of various consultations over recent years on the emerging Local Plan, this section focuses primarily on the most recent consultation that took place between December 2012 and February 2013 as well as any subsequent liaison with relevant stakeholders. In addition a consultation was undertaken in 2010 specifically on the Gosport Waterfront. The feedback from this has been incorporated into the draft proposals of the Local Plan. Consultation to date has shown strong public support for improvements to the town centre and recognition of the potential opportunities arising from the regeneration of the Gosport Waterfront.

4.2 The Borough Council consulted on the policies of the Consultation Draft Local Plan in December 2012. A number of responses were made to the retail and section of the emerging Local Plan. These can be found in more detail in the Borough Council's Summary and Analysis of Consultation Responses. The main points raised can be summarised below and the key issues addressed in Section 5.

4.3 In relation to Gosport Town Centre itself the following comments were made:

- Lack of a variety of shops to meet needs
- Rejuvenated market that keep peoples interest, maybe less of them rotated, lively interesting ones: Art & Craft, French, Farmers, Fruit and Flowers etc.
- Need to offer some good well known retailers a big carrot to attract them to our town
- More than enough fast food outlets, charity shops cheap shops, not a great deal to pop down town for a browse meet a friend have coffee and chat they set the tone of the town.
- The focus is on tourism the town should offer something unique to add to that and attract people to visit and spend money, talk about the town as lovely place to spend time.
- The support for the growth of the evening economy of Gosport Town Centre is welcomed as this will assist in the regeneration of the town and the encouragement of the diversity of its economy in terms of attracting other uses, in particular leisure and hotel uses. The consequent increase in vitality and viability will in turn assist to reduce crime and anti-social behaviour.

- Enhancing evening economy should be subject to due regard to the amenities of local residents

4.4 In relation to the Gosport Waterfront support was expressed from two landowners recognising that the Gosport Waterfront has the potential to accommodate a range of uses including retail floorspace and other town centre uses, including bars and restaurants. Whilst a local resident was concerned that the retail development would not be in the interests of Gosport Town Centre and little detail has been provided on how the Town Centre and Gosport Waterfront would be linked.

4.5 Another resident expressed concern that there would be retail as part of any future scheme at the former Royal Haslar Hospital site.

4.6 A landowner/developer with interests in an out-of-town site considered that their site should be given greater flexibility as a retail site not just an employment site and has concerns regarding the existing evidence base.

4.7 With regards to the evening economy one developer supports the growth for this to help increase the viability and vitality of Gosport Town Centre whereas the residents' association in Lee-on-the-Solent highlighted that enhancing the evening economy should have regard to the amenities of local residents.

4.8 It is also worth noting that no comments were received relating to the following policies:

- Policy LP28: Uses within Centres;
- Policy LP29: Proposals for Retail and Other Town Centre Uses Outside of Centres;
- Policy LP30: Local Shops Outside of Defined Centre; and
- Policy LP31: Commercial Frontages Outside of Defined Centres

5.0 ISSUES ADDRESSED BY THE LOCAL PLAN

5.1 The Plan has addressed a number of issues relating to the town centres and retailing including: the need to retain and enhance a network of retail centres across the Borough; and ensuring that there is sufficient land available to meet anticipated additional retail floorspace based on the latest evidence. These issues are set out below:

The need to ensure that there is an up-to-date evidence base

5.2 The Borough Council continues to update its evidence base relating to centres including regular footfall surveys and surveys of town centre uses and vacancy rates. This helps to provide monitoring on the performance of existing Local Plan policies. Whilst the Borough Council commissioned GVA in 2007 to produce a comprehensive retail study of the Borough with a partial refresh in 2011, it is accepted in the light of comments received to the Consultation Draft of the Local Plan that it has been necessary to commission a new comprehensive study incorporating a detailed resident survey of shopping habits. The Gosport Retail Capacity Study (GVA 2014) therefore provides an up-to-date evidence study and includes a detailed analysis of potential future capacity for additional retail floorspace with recommendations on where most of this development should take place. This study has therefore influenced the policies in the Publication version of the Local Plan and where relevant discussed further below in relation to other key issues.

The need to define and maintain the retail hierarchy in the Borough and protect the role of the centres

5.3 A key objective of the draft Local Plan is to create quality neighbourhoods which can attract high quality facilities and services to the benefit of the whole community. Key elements of this are the Borough's hierarchy of centres which serve as important neighbourhood hubs. They provide a wide range of retail and other town centre services. In order to gauge the effectiveness of current local policies, regular monitoring has been carried out and reported through the Borough Council's Annual Monitoring Reports. Since the adoption of the current Gosport Borough Local Plan Review in 2006, there have been a number of issues facing the Borough's retail centres and include the following:

- Competition from other centres and significant leakage of expenditure out of the Borough by Gosport residents;
- Tough economic conditions and competition from out-of-town and on-line retailers;
- Significant opportunity to expand retail and associated facilities at Gosport Waterfront to complement and enhance Gosport Town Centre which will help 'clawback' customer expenditure;
- The potential to expand the role of neighbourhood centres to provide a wider range of services for the surrounding area particularly those centres with higher vacancy rates;
- Need to meet the demands of the local residents including an increasingly elderly population; and
- Improve the environment of certain centres.

5.4 Evidence from recent studies in retailing trends including The Portas Review (December 2011) show that the nature of town centres are changing and town centres will need to support a greater diversity of uses over time if they are to remain key hubs for residents to visit for shopping, socialising and undertaking a whole host of other functions.

5.5 Current local planning policy is set out in the Gosport Borough Local Plan Review (2006) in saved policies R/S3 and R/S4. These policies set a commercial frontage threshold limit of no more than 33% of the retail units in the principal and district centres comprising of non-A1 and A2 uses and in the lower order centres. In the smaller centres this threshold comprises of no more than 40% of non-A1 uses in order to safeguard the predominantly retail function of each centre.

5.6 As part of the background work on the Consultation Draft Local Plan, a review was carried out of all the Borough's centres. This review looked at the appropriateness of the policy boundary of each centre with recommendations to alter these where appropriate. In the case of Stoke Road District Centre, the identification of primary and secondary frontages was considered to be a positive step forward in enhancing the vitality and viability in this particular centre. The review also looked at the effectiveness of the current policy thresholds, taking into account the challenges facing the centres as outlined above.

5.7 The policy review concluded the following:

- maintain the policy position that no more than 33% of the total length of frontage in Gosport Town Centre and Lee-on-the-Solent Centre should be non A1/A2 uses in order to protect the retail function of these centres;
- differentiate between a primary and secondary frontage within Stoke Road Centre to acknowledge the variation between part of the Centre at maintaining an A1/A2 presence;
- maintain the policy position in the Stoke Road primary frontage that no more than 33% of the total length of frontage;
- allow greater flexibility on the secondary frontage of Stokes Road to enable no more than 50% of frontage to be non-A1-A2;
- merge previous 'local' and 'neighbourhood' centres to become a single type of frontage known as 'neighbourhood centre';
- Increase the non-A1/A2 uses allowable in neighbourhood centres from 40% to 50% to provide greater flexibility of uses.

5.8 No objections were received relating to the proposed change in the thresholds promoted by the Consultation draft. The details of this review are set out in Appendices 1, 2 and 3 of this background paper.

The need to identify sufficient quantum of retail floorspace (net sales area) in appropriate locations

5.9 The various capacity projection outlined in the GVA Report outlined above are summarised in Table 7 based on the provision of 3,060 dwellings over the Plan period.

Table 7: Summary: Capacity projections of additional retail floorspace (net sales) in Gosport Borough between 2014- 2029

	Estimated retail floorspace capacity (net sales area)
Current market share over Gosport Borough area Convenience-76.2% Comparison 39.4%	1,817 m^2
Higher market share for comparison goods over Gosport Borough area Convenience-76.2% Comparison-47.3%[8]	5,365 m^2

5.10 Importantly the projections do not include the completions for the period 2011-2014. If these figures are taken into account the potential quantum of floorspace over the Plan period would increase (see Table 8).

[8] The market share for other destinations in the Borough (i.e 2.3%) has been added to the higher Town Centre market share of 45% (GVA 2014)

Table 8: Summary: Capacity projections of additional retail floorspace (net sales) in Gosport Borough between 2014- 2029

	Estimated retail floorspace capacity (net sales area)
Current market share over Gosport Borough area plus existing completions Convenience-76.2% Comparison 39.4%	5,492 m^2
Higher market share for comparison goods over Gosport Borough area plus existing completions Convenience-76.2% Comparison-47.3%[9]	9,040 m^2

5.11 It is also necessary to consider that the GVA Study identified that the additional floorspace would come from comparison floorspace rather than convenience. However a proportion of the outstanding planning permission is for convenience floorspace (Table 9)

Table 9: Outstanding Convenience Floorspace

Scheme	**Floorspace (net sales area)**
Aldi, Harbour Road (new store)	1,181 m^2
Asda, Dock Road (extension)	473 m^2 (a condition restricting the 788 m^2 granted permission to 40% comparison – therefore at least 60% convenience)
Total estimated convenience	**1,654 m^2**

5.12 Consequently in order to achieve the overall aspiration of clawing back additional comparison expenditure and using it to potentially help regenerate the Town Centre and Waterfront area it is considered appropriate to add the existing convenience commitments to the proposed 5,365m^2 comparison figure. The suggested overall floorspace quantum for the Borough can therefore be summarised as thus:

Table 10: Proposed retail floorspace figure for Gosport Borough 2011-2029

	m^2 (net sales area)
Completions	3,675
+ Comparison floorspace – aspirational capacity to 2029 (market share 47.3%)	5,365
+ Outstanding comparison floorspace permissions	1,654
Total	10,694

5.13 By rounding this figure to the nearest 500 m^2, the proposed quantum for the Plan period would be **<u>10,500m^2</u>** which is at the same level as that identified in the Consultation Draft of the Local Plan (Dec 2012).

5.14 It is considered that this figure is aspirational but realistic and by focusing the remaining floorspace in the Gosport Town Centre and Waterfront will deliver significant regeneration benefits to this area and potentially clawback

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[9] The market share for other destinations in the Borough (i.e 2.3%) has been added to the higher Town Centre market share of 45% (GVA 2014)

expenditure from both out-of centre location and destinations out of the Borough.

5.15 In the light of recent completions and permissions, a significant proportion have been granted outside the centre such as the Alver Village new neighbourhood centre; consequently it is necessary to revise the available retail floorspace for the Gosport Town Centre and Waterfront. This is summarised in Tables 11a and 11b based on two scenarios.

Table 11a: Scenario 1- Retail quantum for Gosport Town Centre and Waterfront

	m^2	Comment
Proposed Local Plan Allocation	10,500 m^2	See above assessment
Minus completions outside of Gosport Town Centre and Waterfront	3,675 m^2	This quantum has been outside the Centre including: the Tesco at Alver Village; the extension at ASDA Dock Road; and unoccupied completed floorspace at Royal Clarence Yard which has permission for A1-A5 use
Minus existing permissions outside of the Town Centre	1,185 m^2	Permissions outside the Centre include a further extension at ASDA Dock Road, Elson Road redevelopment and a maximum of 200m^2 at Daedalus
Minus potential on other allocations outside Gosport Town Centre and Waterfront	340 m^2	This is an estimate of retail floorspace at Haslar Hospital
Total	**5,300 m^2**	Available for A1 retail floorspace in Gosport Town Centre and Waterfront and include the permission for 1,181m^2 outstanding consent for Aldi at the Gosport Waterfront

Table 11b: Scenario 2- Retail quantum for Gosport Town Centre and Waterfront

	m^2	Comment
Proposed Local Plan Allocation	10,500 m^2	See above assessment
Minus completions outside of Gosport Town Centre and Waterfront	2,296 m^2	This differs from option 1 as it is assumed the unoccupied completed floorspace at Royal Clarence Yard which has permission for A1-A5 use will be used for A2-A5 uses not A1
Minus existing permissions outside of the Town Centre	1,185 m^2	Permissions outside the Centre include a further extension at ASDA Dock Road, Elson Road redevelopment and a maximum of 200 m^2 at Daedalus
Minus potential on other allocations outside Gosport Town Centre and Waterfront	340 m^2	This is an estimate of retail floorspace at Haslar Hospital
Total	**6,679** m^2	Available for A1 retail floorspace in Gosport Town Centre and Waterfront and include the permission for 1,181m^2 outstanding consent for Aldi at the Gosport Waterfront

5.16 It is considered that Option 2 would be more realistic (in terms of assumptions at Royal Clarence Yard and at the same time give a greater amount of flexibility in allowing additional retail floorspace to come forward within the Gosport Waterfront and Town Centre area, particularly taking into account the existing planning permission for the Aldi supermarket. For the purposes of the Policy, the proposed quantum has been rounded to the nearest 500 m^2 i.e. 6,500 m^2.

5.17 It is considered that this figure takes in the estimated capacity of additional retail need (largely comparison) as well as planning consents for additional floorspace which includes additional convenience floorspace in the Gosport Town Centre and Waterfront Regeneration Area. It is considered that additional convenience floorspace in the Gosport Waterfront and Town Centre area will help clawback expenditure to the Town Centre area and increase linked trips. This is particularly an important objective as the Town Centre has seen the largest fall in market share since 2007. This provision in the Town Centre will have qualitative benefits extending choice and competition and making the Town Centre more competitive against other parts of the Borough and other destinations outside the Borough.

5.18 It is noted that the GVA Study does not identify significant scope for new retail floorspace outside of existing centres as these are potentially vulnerable and a diversion of trade to out-of-town centres could have a detrimental impact on their viability and vitality. This would accord with the town centres first approach outlined in the NPPF. However in the light of objections made by a land owner/developer for the former Frater House site (also known as Brockhurst Gate) it is considered reasonable to provide greater flexibility regarding the uses at this prominent junction site opposite the Gosport Leisure Park. In the Consultation Draft of the Local Plan (Dec 2012) the site was allocated for employment purposes however it is now intended to allocated the site for economic uses. This could potentially include retail or other town centre uses, although it would be necessary for the developer to demonstrate that the proposal would accord with national and local policies relating to town centres, including meeting the sequential and impact tests. The Borough Council still requires Gosport Town Centre/Waterfront and other centres to be the appropriate location for new retail floorspace but accepts that the re-designation of this site could provide some additional flexibility to meet some of its future bulky goods comparison needs provided it accords with all the relevant policies and tests.

APPENDIX 1: Background to threshold changes in draft policy LP28: Uses within centres

Introduction

1. The Borough Council has been monitoring the retail performance of the all the Borough's retail centres in relation to saved polices R/S3 and R/S4 of the adopted GBLPR. Over this time a number of issues have arisen which have necessitated a review of all the centres. The details of this review are set out in appendices 2-3. It has focused on whether the defined boundary of each centre is still appropriate for its function in the retail hierarchy and whether the current policy threshold limits set out in R/S3 and R/S4 are still appropriate. The findings of the review informed the development of draft policy LP28. In addition to this, the NPPF advocates defining the extent of town centres and primary shopping areas identifying primary and secondary shopping frontages and establishing policies setting out those uses permitted in these areas where this is appropriate and therefore the Borough Council have also considered this matter in its review of the Borough's shopping centres.

2. The review of the adopted policies R/S3: Principal and District Shopping Centres and R/S4: Local and Neighbourhood Centres looked at the following issues:
   - Identification of primary and secondary frontages in the principal and district centres;
   - Revision of the current policy thresholds; and
   - A review of each shopping centre boundary;
   - Where appropriate, maps have been prepared to show the proposed changes.

Summary of issues facing the centres

3. These can be summarised as follows:
   - Competition from other centres and large amounts of expenditure leakage out of the Borough by Gosport residents;
   - Difficult economic climate;
   - New retail floorspace in out-of-centre location and increasing competition from on-line retailers;
   - Potential opportunity to expand the retail and other related town centre services at the Gosport Waterfront with the related benefits to the rejuvenation of Gosport Town Centre and to help achieve some clawback into the Borough.
   - The potential to expand the role of neighbourhood centres to provide a wider range of services for the localities they serve.

4. It is considered that providing greater flexibility in some centres will assist in improving the overall viability and vitality for those centres experiencing persistent high vacancy rates. A greater diversity of uses will provide the opportunities for more linked trips and potentially increase footfall. It would also provide greater accessibility to a wider range of facilities including meeting the needs of an increasingly ageing population. The re-use of long-term vacant units could also assist in improving the environment of some of the centres.

5. The policies in the draft Local Plan have been the subject of a Sustainability Appraisal (SA). The key conclusions of the SA found a number of important positive benefits to draft policy LP28 some of these have been identified as being

'significant'. These identified significant benefits relate to the following sustainability objectives which each policy of the draft local plan has been tested against:

- SA Objective 3: To improve accessibility to a range of quality services and facilities including health, transport, education, training, employment and leisure opportunities; and
- SA Objective 16: To ensure the vitality and viability of the Borough's principal, district and local centres.

In addition to these, the findings of the SA found a number of other 'minor' positive benefits to the draft policy these are as follows:

- SA Objective 5: to encourage a sense of community identity and improve the quality of where people live;
- SA Objective 8: To improve the health and well-being of the population, reduce inequalities in health and improve health facilities;
- SA Objective 9: To ensure that everyone has the opportunity to live in a decent, sustainably constructed and affordable home; and
- SA Objective 17: To improve the quality and accessibility of leisure and cultural opportunities within the Borough.

6. The SA did not identify any negative effects from the draft policy LP28 and concluded that it will provide benefits for the centres.

Principal and District Centres

<u>Current Local Policy context</u>

7. In the Gosport Borough Local Plan Review, Gosport Town Centre, as the Principal Centre and the two District Centres are the prime focus for new retail and service development within the Local Plan area to help ensure their viability and vitality. Therefore proposals for Class A1 (shops), A2 (financial and professional services), A3 (restaurants and cafes), A4 (drinking establishments) and A5 (hot food take-away) are permitted at ground floor level within these centres (subject to them being in general accordance with the other policies of the Local Plan Review).

8. Gosport Town Centre and the two District Centres provide key primary retailing services. In order to protect the core role of these centres and maintain and enhance the current levels of facilities, the adopted threshold is not more than 33 percent of the commercial units within these centres may comprise of uses other than Class A1 and A2 uses. This figure is based on the percentage of the total frontage of each unit. Putting in place a threshold figure has helped to retain a strong A1 core however changes in retailing trends indicates the need for centres to evolve in terms of their function and this has been considered and addressed in the review of retail centres. The tables below show the proportion of A1 and A2 uses (by frontage) in the Principal and District centres. The first table shows the proportions between A1 and A2 based on the current shopping centre boundaries, the second table takes account of the proposed shopping centre boundary changes to Lee-on-the-Solent and Stoke Road centres.

Table 1: Proportion of A1 and A2 uses within the current boundaries (2014)

Name of Centre	A1 (%)	A2 (%)	Total A1/A2 (%)	Non A1/A2 (%)
Gosport Town Centre	52.4	14.0	66.4	33.6
Stoke Road ***(current boundary)***	52.2	18.0	70.2	29.8
Lee-on-the-Solent ***(current boundary)***	66.4	9.7	76.1	23.9

Table 2: Proportion of A1 and A2 uses in the proposed extension to Lee-on-the-Solent and Stoke Road District Centres (2014)

Name of Centre	A1 (%)	A2 (%)	Total A1/A2 (%)	Non A1/A2 (%)
Stoke Road – Primary Frontage	71.4	14.4	85.8	14.2
Stoke Road – Secondary Frontage ***(including revised boundary to shopping area)***	40.6	18.8	59.4	40.6
Lee-on-the-Solent ***(including proposed extension to boundary)***	72.8	9.7	82.5	17.5

9. Vacancies in Gosport Town Centre and Lee-on-the-Solent District Centre in the 2014 survey remain very low with the exception of Stoke Road which continues to experience higher vacancy rates at 14.4% of the total frontage compared to both Gosport Town Centre (5.2%) and Lee on the Solent District Centre (3.5%). However, there are a number of challenges facing the Borough's centres particularly for Stoke Road and these have been highlighted in the paragraphs above. To assist in enhancing the vitality and viability of Stoke Road, the Borough Council considered it appropriate to identify primary and secondary frontages and this is discussed in further detail under the section on Stoke Road.

10. The review also considered whether it would be appropriate to introduce primary and secondary frontages to Gosport Town Centre and the Lee-on-the-Solent District Centre. In comparison to the Stoke Road District Centre, Gosport and Lee-on-the-Solent centres have low rates of vacancies which are a strong indication of healthy footfall and trade. Therefore it was considered that it would not be necessary at this time to introduce a split between primary and secondary frontages. However by introducing a secondary frontage to parts of the Stoke Road centre and focusing on a more tightly defined primary frontage, the Borough Council considers this will assist in attracting a broader diversity of uses and increase footfall.

11. In general terms, draft Local Plan policy LP28 helps the centres respond to these challenges. It allows them to maintain a strong retail role but also allows them to evolve into wider community hubs, making them key players in delivering the Council's overarching strategy for the delivery of sustainable patterns of development.

12. It is proposed to maintain the 33% non-A1/A2 frontage policy provision for the Gosport Town Centre, Lee-on-the-Solent and the primary frontage of Stokes Road. It is noted that the frontage figure for Gosport Town centre has slightly exceeded the 33% threshold (as identified in Table 1) however it is considered necessary to maintain the policy position in order to prevent a further erosion of the A1 core. By maintaining this position would enable the Borough Council to consider each new non A1-A2 proposal on its own merits taking into account factors such as: the proposed use; the length of time a unit has been vacant; whether there is a cluster of vacancies in this particular location; or whether there is a cluster of non-retail uses which could potentially detract from the vitality and viability of the town centre.

13. The 33% threshold would also still enable scope for a greater mix of town centre uses in Lee-on the Solent Centre and the primary frontage of Stokes Road if the demand arises.

14. In terms of the uses shown, tables 3-5 below show the current profiles of the Principal and District Centres and are based on the 2014 surveys.

Table 3: Gosport Town Centre (2014)

Use Class	Frontage Length (M)	% of Total Frontage
A1	920.9	52.4
A2	246.6	14.0
A3	154.7	8.8
A4	46.4	2.6
A5	23.8	1.4
B1	83.5	4.7
Laundrette	0	0.0
Car Hire	0	0.0
Taxi office	0	0.0
SG commercial	76.9	4.4
C3	0	0.0
D1	177.4	10.1
D2	28.9	1.6
SG non commercial	0	0.0
Under construction	0	0.0
Total	1759.1	100
Vacant	91.9	5.2
Total A1/ A2 uses	1167.5	66.4
Total non-A1/A2 uses	591.0	33.6
		100

Table 4: Lee-on-the-Solent District Centre (2014)

Use Class	Frontage Length (M)	% of Total Frontage
A1	462.4	66.4
A2	67.6	9.7
A3	96.6	13.9
A4	0.0	0.0
A5	14.3	2.1
B1	8.0	1.1
Laundrette	0.0	0.0
Car Hire	0.0	0.0
Taxi office	0.0	0.0
SG commercial	16.2	2.3
C3	0.0	0.0
D1	31.5	4.5
D2	0.0	0.0
SG non commercial	0.0	0.0
Under construction	0.0	0.0
Total	696.6	100
Vacant	24.2	3.5
Total A1/A2 uses	530.0	76.0
Total non-A1/A2 uses	166.6	24.0
		100

Changes proposed to Stoke Road District Centre

15. Stoke Road has experienced quite high vacancy levels in comparison to the other two key centres and this continues to be the case since the publication of the Consultation draft Local Plan in December 2012 with vacancies accounting for 14.4% of the total frontage (based on the current adopted retail policy boundary for Stoke Road).

16. NPPF (paragraph 23) states that it is appropriate to define primary and secondary frontages in designated centres and to specify which uses will be permitted in each type of frontage. The draft Local Plan, LP28 (part 1 c) allows for upto 50% of the proposed secondary frontage can be used for non- A1 and A2 uses in order to protect the retail core but allow for other appropriate town centre uses to be permitted within the centre.

17. The draft Local Plan proposes to extend the boundary to the centre at its western end as this reflects a similar character to those shops and businesses at the eastern end of Stoke Road. The units in the proposed extension are defined as secondary frontage. The table below shows the proportions for each type of town centre use in both the proposed primary and secondary frontages and an overall total along with information relating to vacancy levels and the proportions of A1/A2 and non-A1/A2 uses.

Table 5: Stoke Road District Centre (2014) includes proposed extension

Use class	Primary		Secondary		Total	
	Frontage (M)	**% of Total primary frontage**	**Frontage (M)**	**% of Total Secondary frontage**	**Frontage (M)**	**% of the Total frontage**
A1	245.9	71.4	265.0	40.7	510.9	51.29
A2	49.5	14.4	122.3	18.8	171.8	17.24
A3	9.0	2.6	22.7	3.5	31.7	3.18
A4	0.0	0.0	40.3	6.2	40.3	4.04
A5	15.1	4.4	31.7	4.9	46.8	4.69
B1	0.0	0.0	0.0	0.0	0.0	0.0
Car Hire	0.0	0.0	0.0	0.0	0.0	0.0
Taxi office	0.0	0.0	0.0	0.0	0.0	0.0
SG commercial	9.1	2.6	19.8	3.0	28.9	2.90
C3[10]	n/a	n/a	n/a	n/a	n/a	n/a
D1	5.1	1.5	130.4	20.0	135.5	13.6
D2	10.7	3.1	19.3	3.0	30.0	3.0
Under construction	0.0	0.0	0.0	0.0	0.0	0.0
Total	**344.4**	**100**	**651.6**	**100**	**995.97**	**100**
Vacant	58.4	16.9	73.52	11.28	131.92	13.2
Total A1/A2 uses	295.4	85.7	387.3	59.43	682.70	68.54
Total non-A1/A2 uses	49.0	14.2	264.2	40.54	313.20	31.44

Neighbourhood Centres

18. In previous Government policy statements there has been a distinction between local and neighbourhood centres which was the background to which saved policy R/S4 was crafted. In the adopted Gosport Local Plan Review, this policy applies to both local and neighbourhood centres. The Borough Council has monitored the effects of the policy since the adoption of the Local Plan Review in 2006. Through the monitoring process, the Borough Council has identified that in practice, both local and neighbourhood centres perform the same role in delivering the services that local communities need. Therefore it makes sense to treat them in the same way. Therefore in draft policy LP27: Principal, District and Neighbourhood Centres there is no distinction between former local and neighbourhood centres and they will all be known as neighbourhood centres.

Review of adopted retail centres using the 40% threshold and proposed changes to a 50% threshold

18. The adopted saved policy R/S4 in the Gosport Borough Local Plan Review has a threshold requirement of no more than 40% of the uses in these centres should consist of more than non-A1uses. In order to see the effects of creating more flexibility in the centres an analysis was originally undertaken using the data from the 2012 summer surveys. This work has been updated using the data from the

[10] C3 residential uses do not form part of the overall retail frontage calculations.

2014 surveys and looks at the impact of combining A1 and A2 uses as a proportion of the total uses within each centre.

19. Under the current policy R/S4, there are a number of local and neighbourhood centres that have exceeded the 40% threshold and this is shown in table 6 below. Column 2 of table 6 shows the current levels of non-A1 uses in each centre. Column 3 shows how this changes once A1 and A2 uses are combined and column 4 shows the proportion of remaining non-A1/A2 uses.

20. The table shows that even when combining A1 and A2 uses together there are some instances where the current 40% threshold is breached for the remaining uses. (The figures in each column also take account of the proposed revised retail area boundaries for Forton Road/The Crossways and 45-95 Forton Road.)

Table 6: Local and Neighbourhood Centres in the adopted GBLP R (policy R/S4) (2014 survey)

Name of centre	A1 uses (% of total frontage)	profile showing the proportion of non-A1 uses (40% threshold – R/S4)	Centre profile after combining A1/A2 uses	Remaining Non-A1/A2 uses
(1)Gregson Avenue	51.2	**48.8**	56.9	43.1
(2) Rowner Road	44.6	**55.4**	50.5	49.5
(3)Brockhurst Road (29-75)	86.0	14.0	86.0	14.0
(4)Forton Road/The Crossways	61.0	39.0	64.0	36.0[11]
(5)Alverstoke Village	51.2	**48.8**	56.9	**43.1**
(6)Tukes Avenue	100	0	100 (all A1)	0
(7)Nobes Avenue	69.6	30.4	79.6	20.4
(8)Carisbrooke Road	44.6	**55.4**	44.6 (all A1)	**55.4**
(9)Brewers Lane	57.1	**42.9**	78.8	21.2
(10)Beauchamp Avenue	74.3	25.7	74.3 (all A1)	25.7
(11)Rowner Lane	74.7	25.3	74.7 (all A1)	25.3
(12)St. Nicholas Avenue	49.4	50.6	49.4 (all A1)	**50.6**
(13)Nimrod Drive[12]				
(14)Elson Road	49.4	**50.6**	45.0 (all A1)	**55.0**[13]
(15)Palmyra	65.6	34.4	65.6 (all A1)	34.4

[11] This centre includes Kwik Fit which has a particularly large frontage and this will influence the calculation of the frontage figures.
[12] The centre at Nimrod Drive is being replaced by the new allocation called Alver Village and therefore has been discounted in this analysis.
[13] Planning application K 18018 113-117 granted consent 23/03/12 for A1 retail unit (230m²), plus hot food takeaway and residential. Should the permission be implemented then this will significantly enhance the centre's environment and re-dress the balance between the uses in centre.

Road				
(16)Forton Road (335-359, 262-278)	86.5	13.5 (all A2)	100	0
(17)Forton Road (45-95)	45.0	**54.3**	45.0[14] (all A1)	**54.3[15]**
(18)Bury Cross	42.0	58.0	42.0 (all A1)	**58.0[16]**
(19)Queens Parade	70.4	29.6	84.4	15.1
(20)Portsmouth Road	70.1	29.9	70.1 (all A1)	29.9
(21)Dartmouth Court	65.0	35.0	65 (all A1)	35.0
(22)Antice Court, Twyford Drive	65.0	35.0	65.0 (all A1)	35.0
Alver Village	81.6	18.4	81.6 (all A1)	18.4

Proposed boundary changes to Local Centres

21. As part of the review of the local centres, the Borough Council is proposing to amend the boundary to:
    - Forton Road/The Crossways; and
    - 45-95 Forton Road.

<u>Forton Road/The Crossways</u>

22. This local shopping centre fronts on to the A32 includes The Crossways. The shopping area is generally busy and the Lidl store makes a major contribution to enhancing the footfall of the area most of which is concentrated from Reeds Place to the end of the centre boundary finishing at Lees Lane North. From Reeds Place to Alma Street is characterised by non-A1 and A2 uses including properties that have over time been lost to residential use. It is therefore proposed to exclude these properties from the centre so that the centre is clearly defined.

<u>45-95 Forton Road</u>

23. The second key boundary change refers to the policy boundary of 45-95 Forton Road. In the draft Local Plan this centre has been re-named Forton Road/Parham Road. It is proposed to extend the boundary to the north to include the Pizza Hut and the Co-op which was granted planning permission in 2006. It was considered that this proposal would not harm the retail function of the existing centre and provided an opportunity through the provision of the A1 convenience store, to enhance the retail offer for the centre as a whole. By increasing the policy boundary to include these units the overall A1 frontage in the 'new' centre increases from 32.7% of the total frontage of the existing centre boundary as surveyed in 2012 to 45% at the time of the 2014 retail survey

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[14] Under the proposed policy boundary change for this centre, the revised boundary would include the Co-op at 32 Forton Road which is for 319m² and has a frontage of approximately 12.5m.
[15] Under the proposed policy boundary change for this centre, the revised boundary includes the Pizza Hut at 32 Forton Road which is 143m² and has a frontage measuring 10.05m
[16] There are a number of non- A1 units with particularly large frontages:
- Gosport Chiropractic Centre 15.8m (D1use);
- Domino's Pizza 15.3 m (A5); and
- Barclay's Bank (A2) which was vacant at (the time of the 2012 retail survey) had opened as a fish and chip restaurant/take away (A5).

(adjusting for the proposed boundary change to include the Co-Op store - an increase of just over 12%.

24. There are a number of smaller centres which breach the current policy threshold of 40%. In draft LP28 (part 1 d) in order to provide a better degree of flexibility it was decided that the threshold figure might be increased so that non-A1/A2 uses could still be permitted in the centres thus allowing them to respond to changing economic circumstances and opportunities, reducing the scope for long-term vacancies whilst still retaining a significant proportion of the units in A1/A2 uses. Based on the information set out in the table above, it was considered that an increase in non-A1/A2 uses to 50% (rather tan 40%) would provide a workable balance between the mix of uses in the centres.

25. Table 7 below shows how the centres would perform against the new draft policy. The proportion of uses are based on the figures for the 2014 survey but includes the proposed new boundaries and combines A1 and A2 uses together. The Borough Council recognises that even when applying the 50% threshold, there are still some instances where this will be exceeded. However these occurrences are fewer and by increasing the threshold size the Borough Council considers this will allow for greater flexibility between the uses without compromising the core retail function of the centres.

Table 7: Local and neighbourhood centres (proposed revised policy boundaries and change of threshold to 50%) (2014 survey)

	Includes Proposed Revised Retail Area Boundary and the 50% threshold (Draft LP28(1 e))	
Name of centre	**Proportion of the total frontage when combining A1/A2 uses (%)**	**Proportion of the total frontage for remaining Non-A1/A2 uses (%)**
(1)Gregson Avenue	56.9	43.1
(2) Rowner Road	50.5	49.5
(3)Brockhurst Road (29-75)	86.0	14.0
(4)Forton Road/The Crossways	64.0	36.0
(5)Alverstoke Village	56.9	43.1
(6)Tukes Avenue	100 (all A1)	0
(7)Nobes Avenue	79.6	20.4
(8)Carisbrooke Road	44.6 (all A1)	55.4
(9)Brewers Lane	78.8	21.2
(10)Beauchamp Avenue	74.3 (all A1)	25.7
(11)Rowner Lane	74.7 (all A1)	25.3
(12)St. Nicholas Avenue	49.4 (all A1)	50.6
(13)Nimrod Drive[17]		
(14)Elson Road	45.0 (all A1)	55.0
(15)Palmyra Road	65.6 (all A1)	34.4
(16)Forton Road (335-359, 262-278)	100	0
(17)Forton Road (45-95)	45.0 (all A1)	54.3
(18)Bury Cross	42.0 (all A1)	58.0

[17] The centre at Nimrod Drive is being replaced by the new allocation called Alver Village and therefore has been discounted in this analysis.

(19)Queens Parade	84.4	15.1
(20)Portsmouth Road	70.1 (all A1)	29.9
(21)Dartmouth Court	65.0 (all A1)	35.0
(22)Antice Court, Twyford Drive	65.0 (all A1)	35.0
Alver Village	81.6 (all A1)	18.4

APPENDIX 2: Gosport Borough Local Plan 2011-2029: Retail centres – policy boundary review

Recommended changes

1. Borough Council officers carried out a review of the Borough's retail centres to determine what changes to the current boundaries of the retail centres may be necessary. The work also includes changes to the centres that have occurred since the adoption of the Gosport Borough Local Plan Review in May 2006 such as Antice Court at Twyford Drive and some developments that have occurred adjacent to existing centres where there is now an opportunity through the draft Local Plan to include them within the boundary of a particular centre. There are no new changes proposed to the retail centres since those published in the Consultation Draft version of the Local Plan (December 2012).

Table 10: Review of shopping centre boundaries

Centres where changes are proposed	Reasons for change
Lee on the Solent Town Centre	To include the recently built Tesco store. See Appendix 3 below for map.
Stoke Road – westward extension of the boundary to include Nos. 66-68 Stoke Road and Molesworth Rd to Alver Road	This part of Stoke Road contributes to the overall vitality and viability of the centre. It has low levels of vacancies compared to other parts of Stoke Road and will be able to support the retail core of Stoke Road. See Appendix 3 below.
Alver Village – replacement centre	This centre replaces Nimrod Drive as part of the Rowner Renewal Project.[18]
Antice Court, Twyford Drive lee-on-The-Solent	The centre was completed post adoption of the GBLP R.[19]
Forton Road/Parham Road (currently 45-95 Forton Road) – boundary change to include permitted retail development at 32 Forton Road	Application for a mixed use scheme was permitted K 16420/6. Extension of boundary to include the application. See Appendix 3 below.
Forton Road/The Crossways – Reduction of centre boundary removing no 195-Gosport Spiritualist Church at Reed's Place	Recent survey work has shown that this part of the centre is predominantly residential in nature and does not add to the vitality of the rest of the centre. See Appendix 3 below.
Centres where there are very minor or no changes proposed to the policy boundary[20]	
Gosport Town Centre	No change to current policy boundary.
Beauchamp Avenue	No change to current policy boundary.
Brewers Lane	No change to current policy boundary.
Brockhurst Road	No change to current policy boundary.
Bury Cross	No change to current policy boundary
Carisbrooke Road	Minor changes to the boundary in order to draw it more tightly.
Dartmouth Court, Priddy's Hard	Minor changes to the boundary in order to

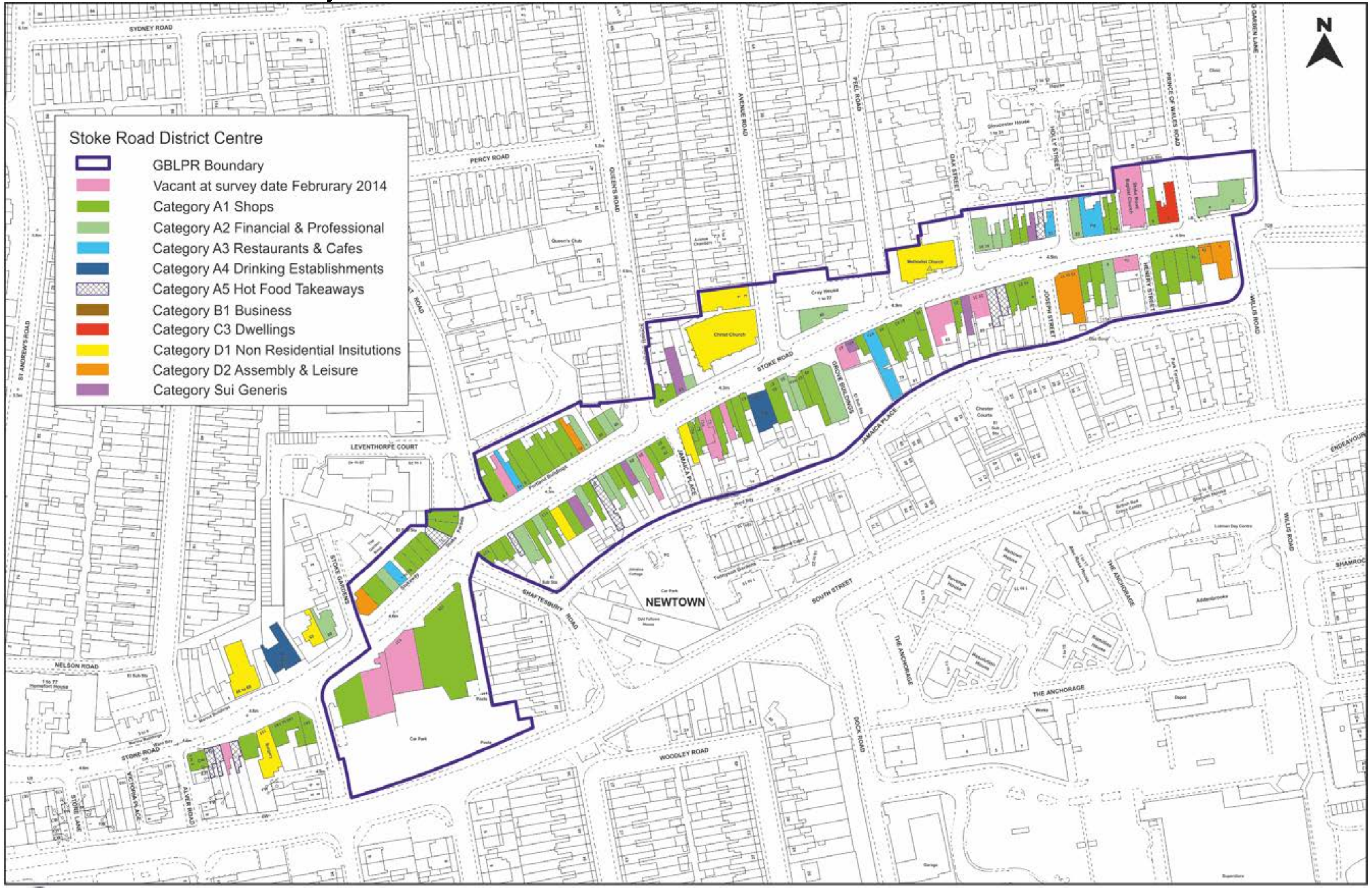
[18] The map for Alver Village neighbourhood centre can be found in Appendix 4 of the Gosport Borough Local Plan 2029 (Publication Version) (July 2014).
[19] See footnote 11 above for reference to Antice Court map.
[20] The maps for these centres can be found in Appendix 4 to the Gosport Borough Local Plan 2029 (Publication Version).

	draw it more tightly.
Elson Road	No change to current policy boundary.
Forton Road/Bedford Street (currently called 225-359, 262-278 Forton Road)	No change to current policy boundary.
Gregson Avenue	No change to current policy boundary.
Nobes Avenue	No change to current policy boundary.
Palmyra Road	No change to current policy boundary.
Portsmouth Road	No change to current policy boundary.
Queens Parade	No change to current policy boundary.
Rowner Lane	No change to current policy boundary.
Rowner Road	No change to current policy boundary.
St. Nicholas Avenue	No change to current policy boundary.
Tukes Avenue	No change to current policy boundary.

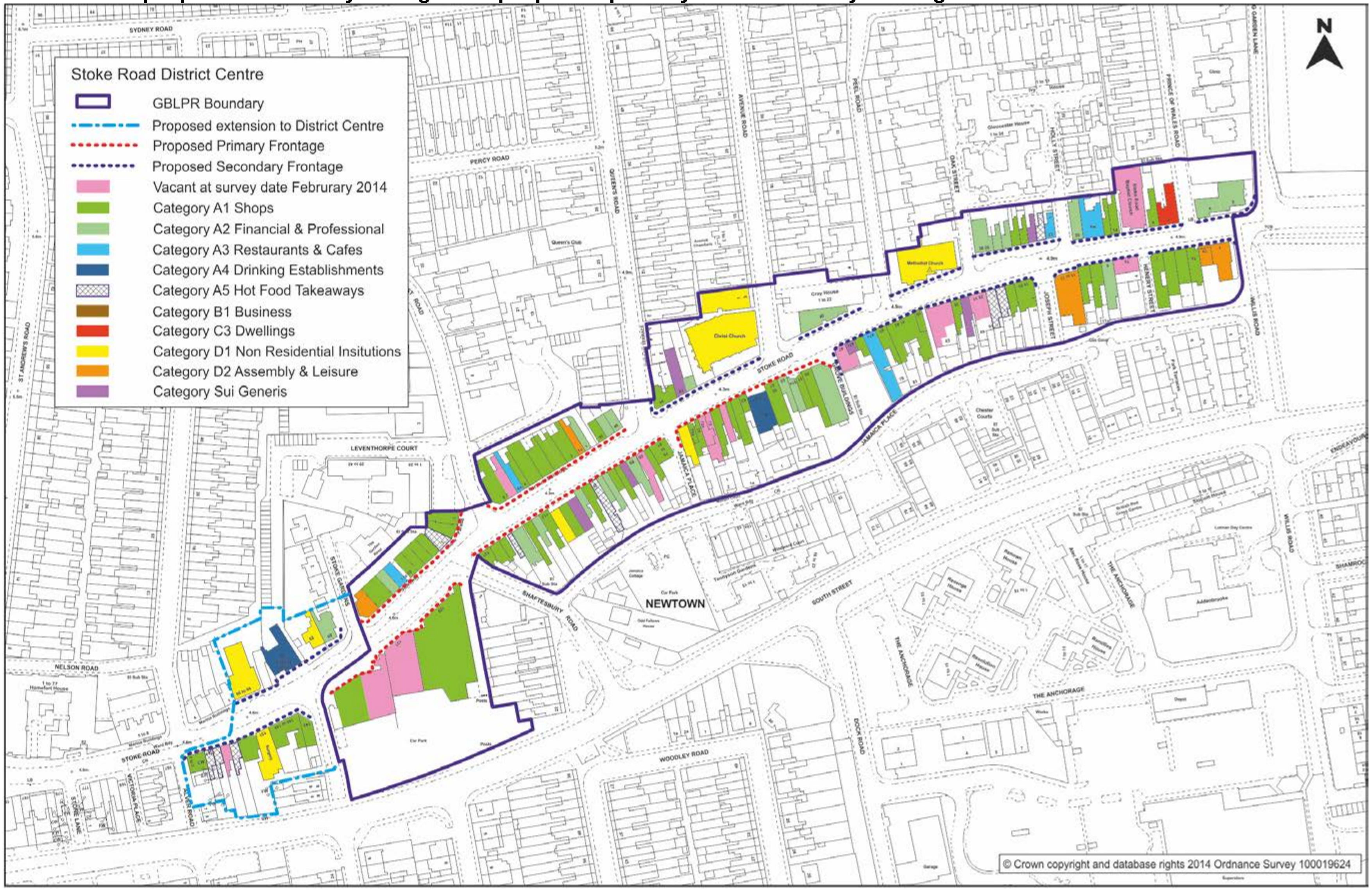
APPENDIX 3: Maps
Lee-on-the-Solent District Centre: current boundary

Lee-on-the-Solent District Centre: proposed boundary change

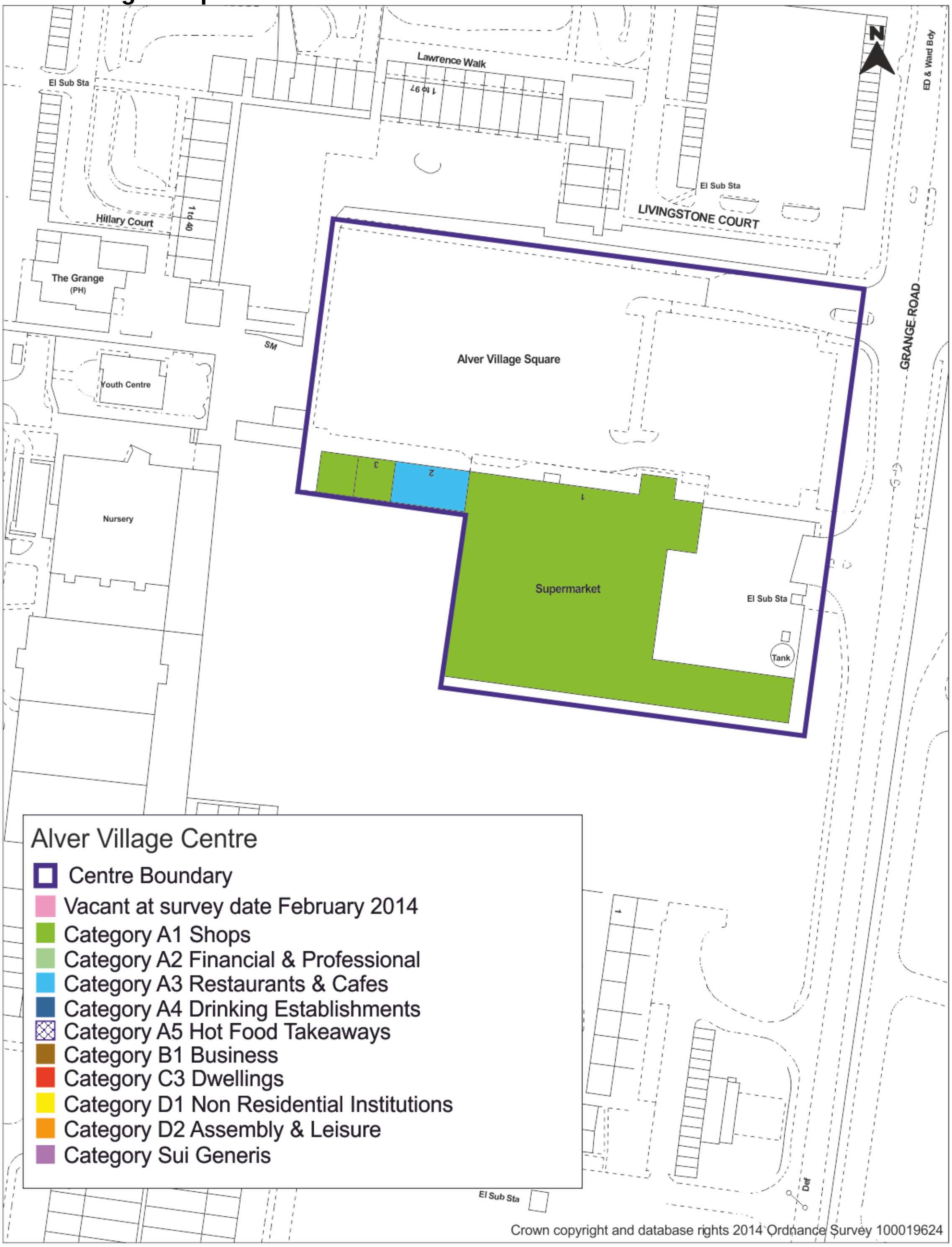
Stoke Road: current boundary



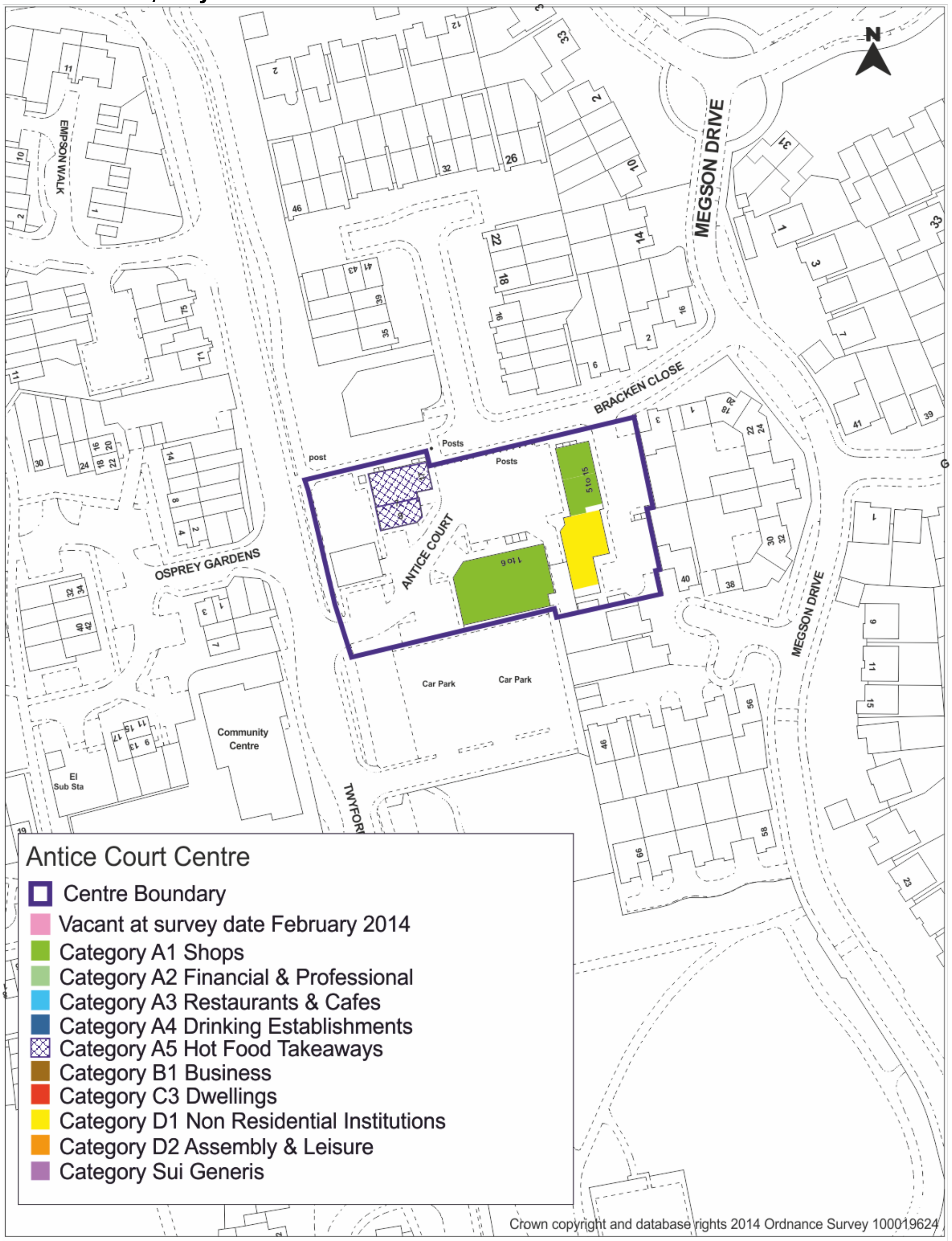
Stoke Road: proposed boundary change and proposed primary and secondary frontages



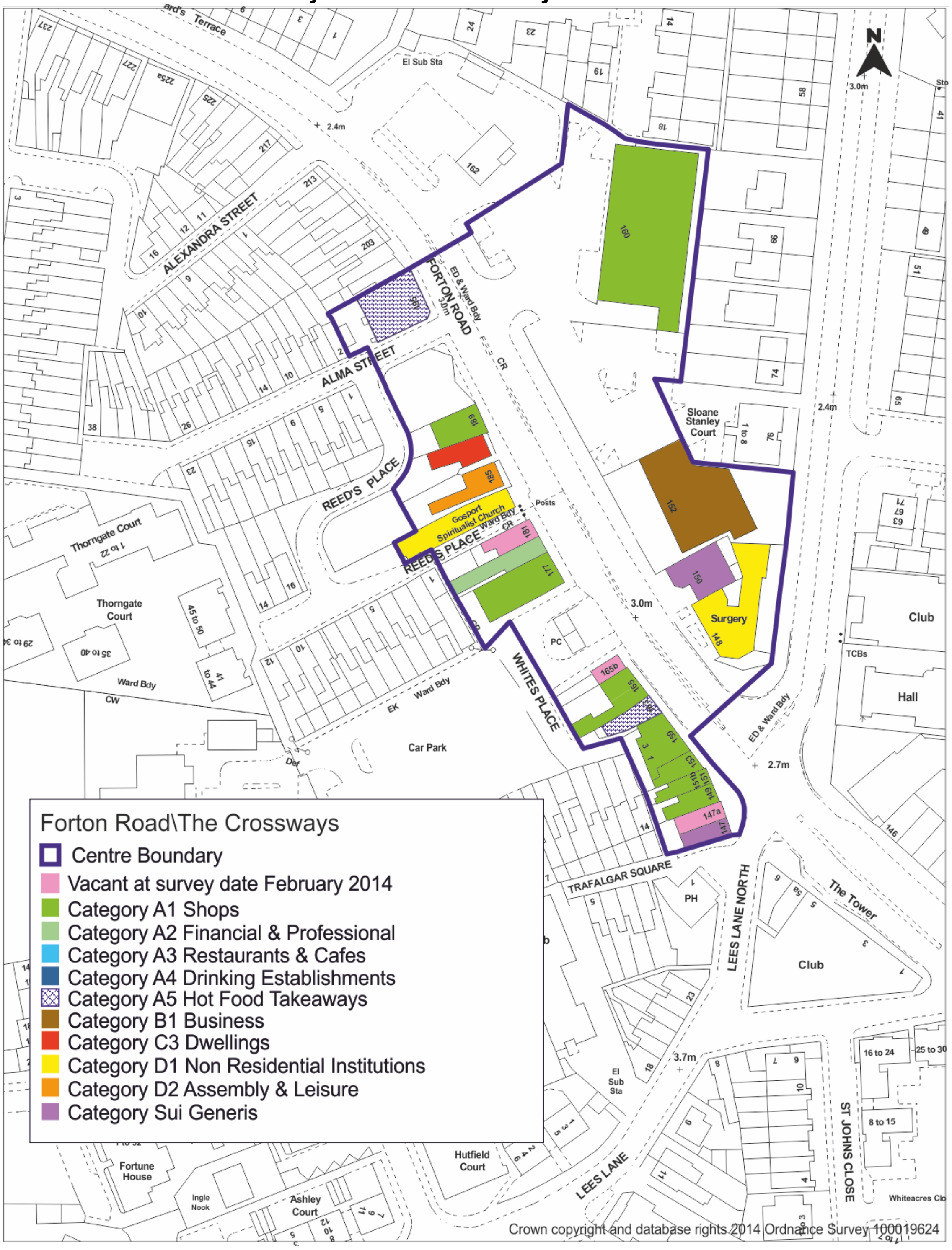
Alver Village – replacement centre:



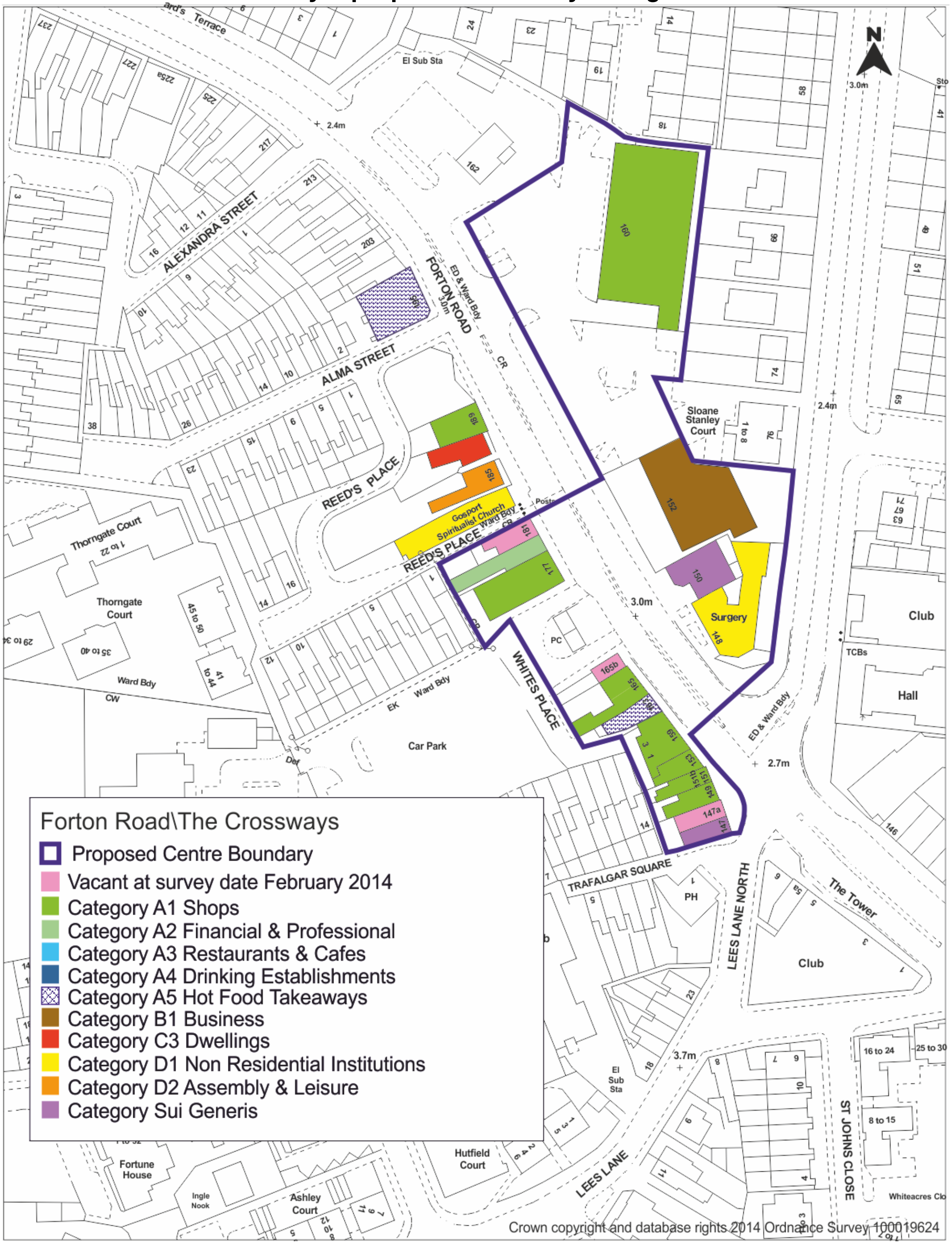
Antice Court, Twyford Drive Lee-on-The-Solent



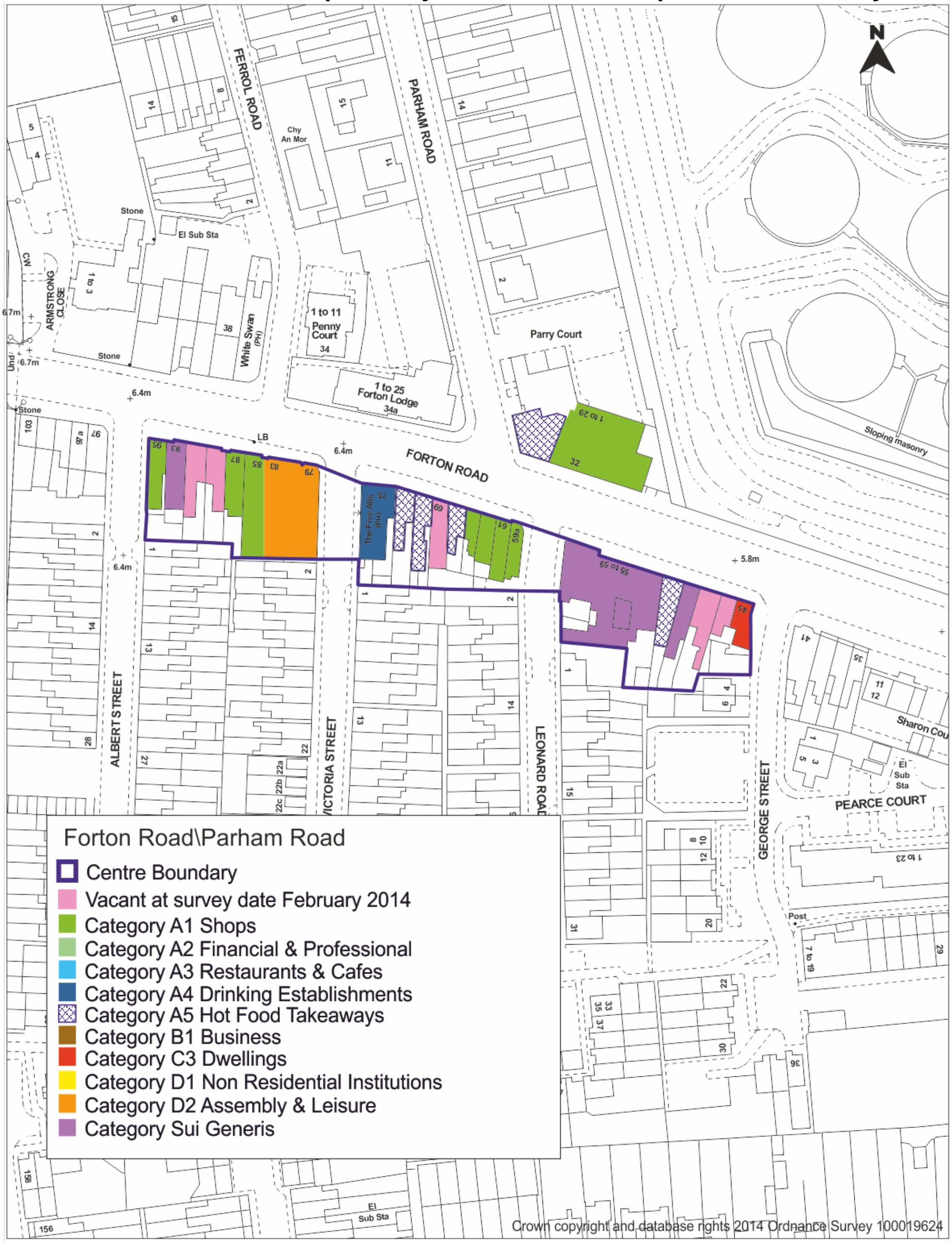
Forton Road/The Crossways: current boundary



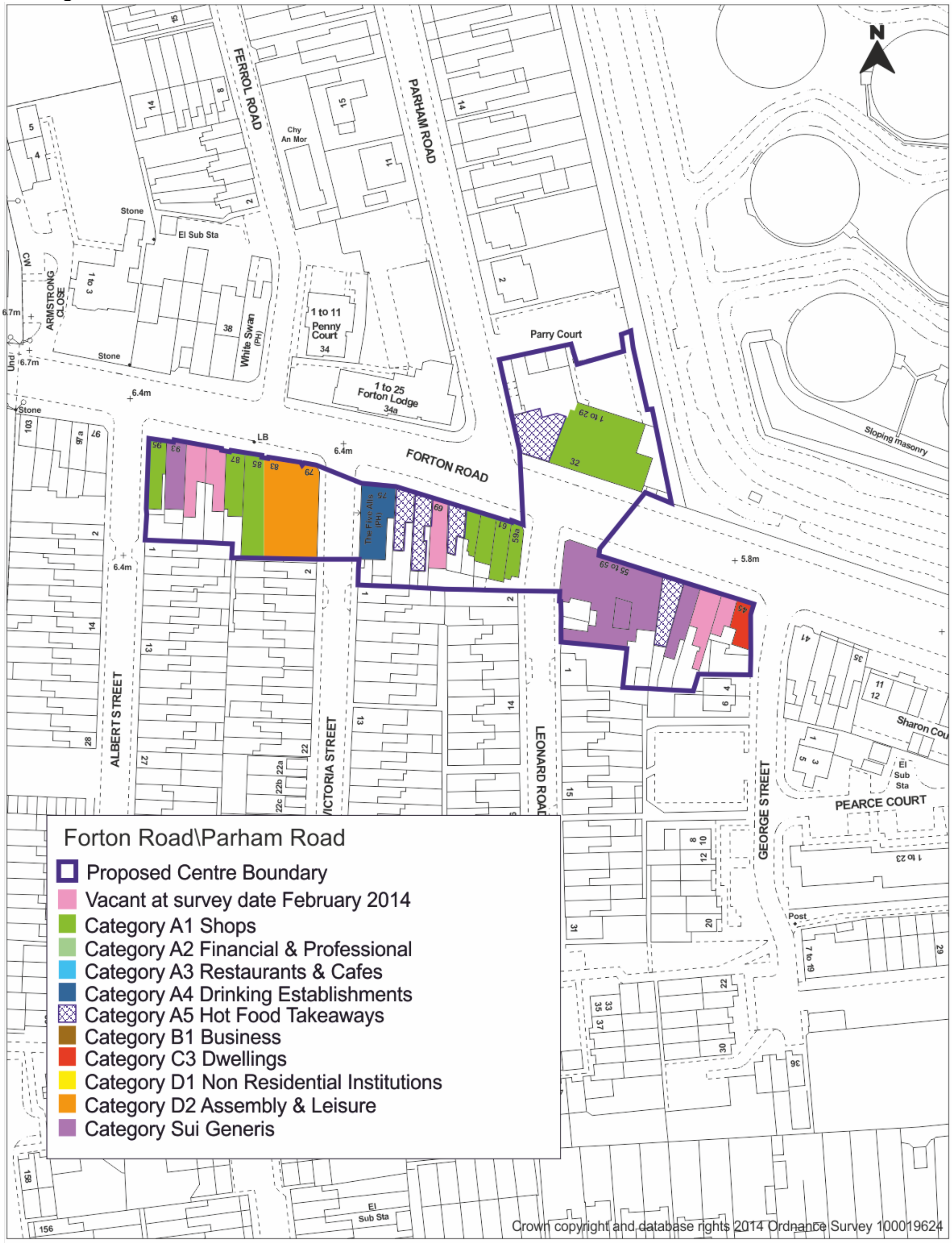
Forton Road/The Crossways: proposed boundary change



Forton Road/Parham Road (currently 45-95 Forton Road): current boundary



Forton Road/Parham Road (currently 45-95 Forton Road): proposed boundary change



APPENDIX 4: Current retail supply (additional floorspace- net sales area)

Retail Completions

	Retail Completions A1)			A2	A3	A4	A5	A1-A5 unspecified	Total A1-A5 (net sales area) m^2	**Total A1 and A1-A5 unspecified available for retail** (net sales area) m^2	Comment
Site	Application No	Gross Internal (m^2)	Net sales area (NSA) (m^2)	Gross internal/Net sales area (m^2)							
Tesco Pier Street, Lee-on-the-Solent	10/0032/FUL	333	250	-	-	-	-	-	250	**250**	-
Tesco Alver Village		3581	2046		186				2232	**2,046**	Store (A1)- 1858 m^2 NSA Unit1 (A3) 186 m^2 NSA Unit 2 (A1) 93 m^2 NSA Unit 3 (A1) 95 m^2 (NSA) Total GIA=3,767 m^2 Total GEA=3,930 m^2 There is a condition on Alver Village of the applications which restricts the comparison floorspace to a maximum of 20% (approximately 400 m^2)[21]
Royal Clarence Yard Units				-	-	-	-	1,379	1,379	**1,379**	Estimated gross internal/net sales area. Area much depends on end-user
Gosport Leisure Park	17660 and 17660/1	-	-	-	690	-	-	-	690	**0**	Pub/restaurant with dining
Total										**3,675**	

[21] Condition attached to the superstore on the Rowner Renewal scheme (1,858 m^2) so there is maximum of 371 m^2. that could be used for comparison.

Retail: Outstanding planning permissions (1/4/14)[22]

	Retail Completions A1)			A2	A3	A4	A5	A1-A5 unspecified	Total A1-A5 (net sales area) m^2	**Total A1 and A1-A5 unspecified available for retail (net sales area)** m^2	Comment
Site	Application No	Gross Internal (m^2)	Net sales area (NSA) (m^2)	Gross internal/Net sales area (m^2)							
ASDA Dock Road		788	788	-	-	-	-	-	788	**788**	The ASDA application 12/00105 specifies a GIA of 788 m^2 it looks like the GIA will be the same as the nets sales floorspace and the decision notice restricts comparison floorspace to 40%
113-117 Elson Road	12/00107/DETS 18018	229	197	-	-	-	-	-	197	**197**	Under construction
Aldi Mumby Road	14/00076	1,550	1,181	-	-	-	-	-	1,181	**1,181**	
Daedalus[23]				-	-	-	-	1,074 (but max 200 m^2 in A1)	1,074(but max 200 m^2 in A1.)	**200**	Planning permission granted in principle at Daedalus for 1,074 m^2 (gross internal) for unspecified A1-A5 subject to S106 Agreement. A maximum of 200 m^2 of this would be A1
Total										**2,366**	

Retail/Retail elements within mixed use allocations

	Retail Completions A1)			A2	A3	A4	A5	A1-A5 unspecified	Total A1-A5 (net sales area) m^2	**Total A1 and A1-A5 unspecified available for retail (net sales area)** m^2	Comment
Site	Application No	Gross Internal (m^2)	Net sales area (NSA) (m^2)	Gross internal/Net sales area (m^2)							
Haslar Hospital			340	-	-	-	-	-		340	
Total										**340**	

Appendix 5: Evidence Studies and other references

[22] Includes the significant edge-of-centre application granted after 1/4/14
23 Planning permission granted in principle subject to Section 106 Agreement

National Guidance

Department for Communities and Local Government (DCLG) (March 2012) National Planning Practice Guidance
http://planningguidance.planningportal.gov.uk/

Department for Communities and Local Government (DCLG) (March 2012) National Planning Policy Framework
www.gov.uk/government/publications/national-planning-policy-framework--2

Mary Portas,(December 2011) The Portas Review: An Independent review into the future of our high streets
http://www.maryportas.com/wp-content/uploads/The_Portas_Review.pdf

Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013
http://www.legislation.gov.uk/uksi/2013/1101/made/data.pdf

Sub Regional Planning Documents

DTZ(March 2006)-South Hampshire Town Centres Sub Regional Study Volumes 1-3
http://www.push.gov.uk/south_hampshire_town_centres_-_sub-regional_study_-_volume_1.pdf

http://www.push.gov.uk/south_hampshire_town_centres_-_sub-regional_study_-_volume_2.pdf

http://www.push.gov.uk/south_hampshire_town_centres_-_sub-regional_study_-_volume_3.pdf

PUSH(October 2012) - South Hampshire Strategy: A framework to guide sustainable development and change to 2026
www.push.gov.uk/work/housing-and-planning/south_hampshire_strategy.htm

Local Planning Documents

Gosport Borough Council (2013)- Annual Monitoring Report
www.gosport.gov.uk/annual-monitoring-report

Gosport Borough Council (2006) – Gosport Borough Local Plan Review
www.gosport.gov.uk/localplanreview

Gosport Partnership (2007) - Gosport's 2026 Vision : Gosport's Sustainable Community Strategy
www.gosport.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=19159

GVA(2014) – Gosport Retail Capacity Study
www.gosport.gov.uk/localplan2029-evidencestudies

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Published: June 2014

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