

Appendix [2]

Health check: WaterlooVille Town Centre

Introduction

The Core Strategy (2011)(CS) identifies WaterlooVille as a Town Centre alongside Havant (Policy CS4 'Town, District and Local Centres'). Paragraph 3.42 of the CS states:

Waterlooville Town Centre developed to support expanding post-war residential areas west of the A3(M). It contains two small pedestrian precincts and Dukes Walk Shopping Centre. Its key roles are similar to those of Havant Town Centre. Waterlooville serves the western side of the borough including the villages of Denmead and Horndean located in neighbouring local authorities. The public realm has been significantly enhanced with a number of town centre improvement schemes. Key challenges for the town centre are integration with the Major Development Area (MDA), which is identified as a strategic site and improved connectivity with Wellington Retail Park.

Policy CS5 'Regeneration of the Borough' seeks to improve the public realm along London Road, improve the integration of the town centre including the connectivity to the Wellington Retail Park.

The most recent health check of the centre is contained within the Council's 'Town Centres Study' (March 2020)(TCS). This confirmed at in 2015 the centre contained 196 uses and over 52,000 sq.m. gross of floorspace. It confirms that it performs the role of a medium sized town centre, with the traditional shopping area lying to the east of St. Georges Walk, Hambleton Road and Stakes Hill Road.

At the time of the 2020 survey the key shopping areas were identified as comprising a series of character areas although since that time a number of major retailers such as Waitrose and Wilkinson have closed.

Wellington Way

The Wellington Way centre is an enclosed shopping centre built in the 1970s. It has connections from the surface level car park through the centre to London Road. It records that the centre contains 27 shop and service units which house a variety of multinational and independent traders as well as four charity shops. It is performing poorly overall, with a large proportion of the units vacant (30% as of October 2015, this increased to 41% in April 2017). Our survey now indicates even higher levels of vacancy as a consequence of this part of the centre undergoing extensive refurbishment (see Photograph 1). The public realm and environment of Wellington Way is not inviting and relatively enclosed in contrast with London Road and Dukes Walk in particular.

Photograph 1: Wellington Way and refurbishment works



The Boulevard

The Boulevard is a pedestrianised area to the south east of London Road which links London Road to the Dukes Walk shopping centre. It also dates from the 1970s. It has 22 units, out of which 5 (23%) were vacant in April 2017. Due to their small size most of the units are independent traders, however occupiers also include Costa Coffee and O2. Five of the 15 occupied units are charity shops.

St George's Walk/Hambledon Road

St George's Walk (which falls within a secondary retail frontage)/Hambledon Road contain a mixture of shops, services and other uses. Other services and uses include offices (B1), hairdressers and a dental surgery. St George's Walk provides a direct connection on foot between London Road and Wellington Retail Park.

Dukes Walk

The Dukes Walk shopping centre consists of a terrace of 10 retail units. It makes reference to a Waitrose supermarket (this was closed in September 2020) and Wilkinsons (closed in September 2023 although now re-occupied by OneBeyond, a discount household goods retailer). The units overlook a large and shared surface level car park. The scheme has good connections with London Road via The Boulevard, but otherwise faces away from the rest of the centre.

Photograph 2: Dukes Walk



London Road

London Road is the traditional main shopping street in Waterloooville and can be considered as the High Street. It contains a range of shops and services, consisting of predominantly A1 uses and multiple traders. Vacancy rates are recorded as being very low. The pedestrianised part of London Road is also the location for a bustling street market held once a week on Fridays which attracts visitors.

Wellington Retail Park

Large retail units housing major brand multiple stores including Matalan, Argos Extra, TK Maxx, M&S Food, Dreams, Brentano's, Carpetright and DFS. The retail park is connected to the rest of the town centre on foot via an underpass beneath the A3 as well as a pedestrian crossing over the A3. To the immediate north there is a large Sainsbury's superstore. This opened in December 2014 and has an adjacent free surface car park and undercroft parking. The retail park was included in the town centre as part of the previous Local Plan boundary review in 2014.

Asda

Extensive (c. 3,285 sqm.) supermarket to the northwest of London Road, at the western end of the town centre. The store sells both convenience and comparison goods. Vehicular access is directly from the A3 Maurepas Way and the store has a large free car park which also serves as car parking for visitors to the rest of the town centre, subject to a two hour limit. The store is also accessible on foot via Portland Road and other parts of the town centre although pedestrian routes are not clearly signposted.

We have provided an updated assessment broadly based on the 2020 survey (although it should be noted that the GOAD Category Report and Plan (April 2023) do not include the Wellington Retail Park and Sainsbury's store) and the data includes information on:

- Diversity of uses
- Retailer representation
- Vacancy rates
- Yields and rental levels
- Accessibility

- Town centre environment
- Perception of crime.

(i) **Diversity of uses**

Multiple outlets

Tables A and B confirm that the centre contains 58 multiple outlets¹ occupying 21,692 sq.m. gross. based on the GOAD category report. Comparison goods multiples are broadly in line with the GOAD average with convenience goods outlets below the GOAD average. However as confirmed in **Table B**, the centre has above average levels of convenience goods floorspace by multiples.

Table A: Multiple Outlet Counts	Outlets	Area %	Base %	Index
Comparison	23	39.66	40.93	97
Convenience	5	8.62	12.68	68
Retail Service	10	17.24	10.06	171
Leisure Services	8	13.79	23.66	58
Financial & Business Services	12	20.69	12.67	163
Total Multiple Outlets	58			

Table B: Multiple Outlets by Floorspace Sq. m.	Outlets	Area %	Base %	Index
Comparison	9,123	42.06	43.79	96
Convenience	6,968	23.12	27.63	116
Retail Service	1,514	6.98	3.84	182
Leisure Services	1,802	8.31	17.89	46
Financial & Business Services	2,285	10.54	6.85	154
Total Multiple Floorspace	21,692			

Leisure services and financial and business service multiples are well represented in terms of both outlet count and floorspace.. being well in excess of the GOAD average for all centres. These sectors therefore make a significant contribution to the centre's attractiveness and vitality. In addition there is a street market every Friday along London Road with stall holders selling a variety of food, clothing, household, garden and other goods (see Photograph 1).

¹ GOAD confirm that a multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre

Photograph 1: Street market along London Road



Comparison goods

Tables C and **D** set out the comparison goods outlets (44) and floorspace (12,327 sq.m. gross) by sub-category/classification which achieve indices of 92 and 100 against the GOAD all centre average². The centre benefits from strong representation in shops selling carpets/flooring, DIY/home improvement, electrical/durable goods, greeting cards, telephone and toys/games being above or well above the GOAD average.

The former Wilkinsons store at Dukes Walk has been re-occupied by OneBeyond a discount household goods retailer (see Photograph 2)

The distribution of comparison and convenience goods outlets throughout the centre is indicated on the GOAD plan attached as **Appendix [2]**.

There is a limited representation of clothing outlets reflecting the strong competition from competing centres such as Southampton, Portsmouth and Gun Wharf Quays. This is also reflected in below average levels of footwear, jewellery/watch and furniture in general.

² GOAD provides an indexing system which illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count. This provides a broad indication of sectors which are under or well represented although of course it also reflects the fact that GOAD survey a wide range of centres from strategic to district and local centres.

Photograph 2: OneBeyond has occupied the former Wilkinsons store at Nos, 12-15 Dukes Walk



The vitality and health of the centre in this sector benefits from the Wellington Retail Park (see Photograph 3). A pedestrian underpass connects this part of the centre under the A3 (Maurepas Way) and in addition there is a disability compliant access into and from the retail park.

Photograph 3: Wellington Retail Park



Table C: Comparison goods outlets				
Classification	Outlets	Area %	Base %	Index
Comparison Sector				
Antique Shops	0	0.00	0.35	0
Art & Art Dealers	0	0.00	0.65	0
Booksellers	1	0.55	0.49	113
Carpets & Flooring	3	1.66	0.51	328
Catalogue Showrooms	0	0.00	0.08	0
Charity Shops	6	3.31	2.42	137
Chemist & Drugstores	2	1.10	0.96	115
Children's & Infants Wear	0	0.00	0.27	0
Clothing General	1	0.55	1.54	36
Crafts, Gifts, China & Glass	0	0.00	1.57	0
Cycles & Accessories	0	0.00	0.22	0
Department & Variety Stores	1	0.55	0.32	171
DIY & Home Improvement	3	1.66	0.63	262
Electrical & Other Durable Goods	3	1.66	0.80	208
Florists	1	0.55	0.53	105
Footwear	1	0.55	0.70	79
Furniture Fitted	1	0.55	0.38	146
Furniture General	1	0.55	0.64	87
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	2	1.10	0.55	201
Hardware & Household Goods	1	0.55	1.29	43
Jewellery, Watches & Silver	1	0.55	0.41	39
Ladies & Mens Wear & Acc	0	0.00	1.50	0
Ladies Wear & Accessories	2	1.10	1.18	94
Leather & Travel Goods	0	0.00	0.09	0
Mens Wear & Accessories	0	0.00	0.52	0
Music & Musical Instruments	0	0.00	0.07	0
Music & Video Recordings	0	0.00	0.21	0
Newsagents & Stationers	1	0.55	0.46	120
Office Supplies	0	0.00	0.01	0
Other Comparison Goods	3	1.66	1.10	150
Photographic & Optical	0	0.00	0.08	0
Second-hand Goods, Books etc	0	0.00	0.28	0
Sports, Camping & Leisure Goods	1	0.55	0.59	93
Telephones & Accessories	4	2.21	1.41	157
Textiles & Soft Furnishings	1	0.55	0.49	113
Toiletries, Cosmetics & Beauty Products	2	1.10	1.07	104
Toys, Games & Hobbies	2	1.10	0.67	166
Vehicle & Motorcycle Sales	0	0.00	0.23	0
Vehicle Accessories	0	0.00	0.11	0
Total Comparison	44	24.31	26.40	92

Table D: Comparison goods floorspace

Classification	Floorspace Sq.m.	Area %	Base %	Index
Comparison Sector				
Antique Shops	0	0.00	0.20	0
Art & Art Dealers	0	0.00	0.38	0
Booksellers	204	0.49	0.45	110
Carpets & Flooring	204	0.49	0.47	103
Catalogue Showrooms	0	0.00	0.20	0
Charity Shops	734	1.75	1.86	94
Chemist & Drugstores	548	0.31	1.38	95
Children's & Infants Wear	0	0.00	0.16	0
Clothing General	204	0.47	2.86	16
Crafts, Gifts, China & Glass	0	0.00	0.82	0
Cycles & Accessories	0	0.00	0.17	0
Department & Variety Stores	1,616	3.86	3.00	129
DIY & Home Improvement	3,762	9.00	0.93	969
Electrical & Other Durable Goods	297	0.71	0.63	113
Florists	102	0.24	0.19	126
Footwear	223	0.53	0.68	78
Furniture Fitted	84	0.20	0.34	59
Furniture General	214	0.51	1.13	45
Gardens & Equipment	0	0.00	0.08	0
Greeting Cards	353	0.84	0.41	208
Hardware & Household Goods	437	1.04	3.11	34
Jewellery, Watches & Silver	102	0.24	0.67	37
Ladies & Mens Wear & Accessories	0	0.00	2.16	0
Ladies Wear & Accessories	409	0.98	0.89	110
Leather & Travel Goods	0	0.00	0.05	0
Mens Wear & Accessories	0	0.00	0.36	0
Music & Musical Instruments	0	0.00	0.05	0
Music & Video Recordings	0	0.00	0.17	0
Newsagents & Stationers	269	0.64	0.48	134
Office Supplies	0	0.00	0.01	0
Other Comparison Goods	214	0.51	0.72	71
Photographic & Optical	0	0.00	0.04	0
Secondhand Goods, Books etc	0	0.00	0.15	0
Sports, Camping & Leisure Goods	399	0.96	1.02	94
Telephones & Accessories	465	1.11	0.61	181
Textiles & Soft Furnishings	595	1.42	0.38	374
Toiletries, Cosmetics & Beauty Products	613	1.47	1.02	143
Toys, Games & Hobbies	279	0.67	0.58	115
Vehicle & Motorcycle Sales	0	0.00	0.47	0
Vehicle Accessories	0	0.00	0.15	0
Total Comparison	12,327	29.45	29.42	100

The TCS (March 2020) confirmed that the centre had 82 comparison goods outlets (45.1% of units) and occupying 30,120 sq.m. gross of floorspace (57.6%). However the difference is largely accounted for by the GOAD Category report and plan (April 2023) excluding the retail park and Sainsbury's food store. These additional stores add a further 19,391 sq.m. gross to the town centre floor area.

Convenience goods

Tables E and F indicate the outlet (12) and floorspace (8,148 sq.m. gross) within the convenience good sector. Convenience goods outlets comprise 6.6% of the total and 17.7% of the floorspace. It has a good representation of bakers and confectioners. Convenience goods stores, frozen food, greengrocers and health food shops which are all represented as being at or above the GOAD average. There is one supermarket within the centre as recorded by GOAD (Asda).

Table E: Convenience goods outlets				
Classification	Outlets	Area %	Base %	Index
Convenience Sector				
Bakers & Confectioners	4	2.21	1.82	121
Butchers	0	0.00	0.56	0
CTN	2	1.10	1.07	103
Convenience Stores	0	0.00	2.05	0
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.55	0.26	210
Greengrocers	1	0.55	0.22	254
Grocers & Delicatessens	1	0.55	1.08	51
Health Foods	1	0.55	0.46	121
Markets	0	0.00	0.10	0
Off Licences	0	0.00	0.40	0
Shoe Repairs etc	1	0.55	0.37	147
Supermarkets	1	0.55	0.79	70
Total Convenience	12	6.63	9.31	71

The number of convenience goods outlets has increased slightly from that recorded in the Council's 2020 report (based on a survey in 2015). This recorded 11 units (6% of the total) with 1,830 sq.m. of floorspace (20.7%). However the most recent GOAD plan and report confirm a slight increase in outlets and a significantly higher level of convenience goods floorspace which can only be accounted for by the inclusion of both Asda and Sainsbury's and the alterations to the town centre boundary.

Table F: Convenience goods floorspace				
Classification	Floorspace Sq.m.	Area %	Base %	Index
Convenience Sector				
Bakers & Confectioners	251	0.60	0.92	65
Butchers	0	0.00	0.28	0
CTN	121	0.29	0.40	72
Convenience Stores	0	0.00	2.07	0
Fishmongers	0	0.00	0.05	0
Frozen Foods	585	1.40	0.80	175
Greengrocers	93	0.22	0.10	222
Grocers & Delicatessens	800	0.18	0.66	27
Health Foods	214	0.51	0.29	176
Markets	0	0.00	0.75	0
Off Licences	0	0.00	0.23	0
Shoe Repairs etc	111	0.27	0.13	213
Supermarkets	5973	14.28	8.88	161
Total Convenience	8,148	17.75	15.57	114

Retail service

Tables G and H, summarise the outlets (38) and floorspace (4,218 sq.m.) within the retail service sector which is dominated by health and beauty outlets (22). This sector is also supported by opticians, vehicle rental and vehicle repair/services.

Table G: Retail service sector outlets				
Classification	Outlets	Area %	Base %	Index
Retail Service Sector				
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	0	0.00	0.61	0
Filling Stations	2	1.10	0.23	480
Health & Beauty	22	12.15	10.97	111
Opticians	4	2.21	1.27	174
Other Retail Services	3	1.66	0.64	260
Photo Processing	0	0.00	0.15	0
Photo Studio	0	0.00	0.12	0
Post Offices	1	0.55	0.48	116
Repairs, Alterations & Restoration	0	0.00	0.28	0
Travel Agents	2	1.10	0.55	201
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	1	0.55	0.04	1,247
Vehicle Repairs & Services	3	1.66	0.48	342
Video Tape Rental	0	0.00	0.01	0
Total Retail	38	20.99	15.90	132

Table H: Retail service sector floorspace				
Classification	Floorspace Sq.m.	Area %	Base %	Index
Retail Service Sector				
Clothing & Fancy Dress Hire	0	0.00	0.02	0
Dry Cleaners & Launderettes	0	0.00	0.27	0
Filling Stations	269	0.64	0.12	546
Health & Beauty	1,951	4.66	4.21	111
Opticians	325	0.78	0.74	105
Other Retail Services	437	1.04	0.43	242
Photo Processing	0	0.00	0.06	0
Photo Studio	0	0.00	0.05	0
Post Offices	130	0.31	0.31	99
Repairs, Alterations & Restoration	0	0.00	0.09	0
Travel Agents	158	0.38	0.29	132
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	251	0.60	0.04	1,514
Vehicle Repairs & Services	697	1.67	0.67	250
Video Tape Rental	0	0.00	0.00	0
Total Retail	4,218	10.08	7.31	138

Leisure services

Tables I and J contain information on the number (29) and floorspace (6,353 sq.m.) within the leisure services sector. Fast food and takeaway outlets predominate although these are at the GOAD average. Cafes and restaurants are below the UK average along with public houses. The GOAD plan attached as **Appendix [3]** contains the location of the main food and drink outlets).

Table I: Leisure service sector outlets				
Classification	Outlets	Area %	Base %	Index
Leisure Services Sector				
Bars & Wine Bars	1	0.55	2.32	24
Bingo & Amusements	1	0.55	0.47	117
Cafes	5	2.76	5.13	54
Casinos & Betting Offices	2	1.10	0.99	111
Cinemas, Theatres & Concert Halls	0	0.00	0.31	0
Clubs	1	0.55	0.55	100
Disco, Dance & Nightclubs	0	0.00	0.17	0
Fast Food & Take Away	11	6.08	6.14	99
Hotels & Guest Houses	0	0.00	0.88	0
Public Houses	2	1.10	2.56	43
Restaurants	4	2.21	5.05	44
Sports & Leisure Facilities	2	1.10	1.18	94
Total Leisure Services	29	16.02	25.76	62

Table J: Leisure services sector floorspace				
Classification	Floorspace Sq.m.	Area %	Base %	Index
Leisure Services Sector				
Bars & Wine Bars	307	0.73	2.44	30
Bingo & Amusements	288	0.69	0.96	72
Cafes	502	1.20	2.91	41
Casinos & Betting Offices	307	0.73	0.82	90
Cinemas, Theatres & Concert Halls	0	0.00	1.89	0
Clubs	297	0.71	0.98	73
Disco, Dance & Nightclubs	0	0.00	0.32	0
Fast Food & Take Away	1,234	2.95	3.10	95
Hotels & Guest Houses	0	0.00	2.60	0
Public Houses	873	2.09	3.38	62
Restaurants	641	1.53	4.27	36
Sports & Leisure Facilities	1,904	4.55	3.00	152
Total Leisure Services	6,353	15.19	26.66	57

Finance and business

Tables K and L indicate that there are 22 outlets within this sector occupying 3,475 sq.m. gross of floorspace. In terms of outlets and floorspace the centre is above the UK average with indices of 146 and 133, respectively. Property services (which includes estate and letting agencies) dominate with 11 outlets.

Table K: Financial and business sector outlets				
Classification	Outlets	Area %	Base %	Index
Financial & Business Services Sector				
Building Societies	1	0.55	0.37	151
Building Supplies & Services	1	0.55	0.46	120
Business Goods & Services	0	0.00	0.02	0
Employment & Careers	0	0.00	0.29	0
Financial Services	2	1.10	1.30	85
Legal Services	2	1.10	1.03	107
Other Business Services	0	0.00	0.38	0
Printing & Copying	0	0.00	0.24	0
Property Services	11	6.08	2.98	204
Retail Banks	5	2.76	1.26	219
Total Financial & Business	22	12.15	8.33	146

However the centre also benefits from a good selection of banks (5) which is more than double the GOAD UK average by count.

Table L: Financial and business sector floorspace				
Classification	Floorspace Sq.m.	Area %	Base %	Index
Financial & Business Services Sector				
Building Societies	149	0.36	0.29	123
Building Supplies & Services	149	0.36	0.42	85
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.16	0
Financial Services	242	0.58	0.73	80
Legal Services	427	1.02	0.75	137
Other Business Services	0	0.00	0.54	0
Printing & Copying	0	0.00	0.13	0
Property Services	1,059	2.53	1.60	159
Retail Banks	1,449	3.47	0.63	212
Total Financial & Business	3,475	8.31	6.25	133

(ii) Retailer representation

The GOAD Category Report (April 2023) confirms that the centre has 58 multiple retailers³ and 6 Major retailers: Boots, WH Smith, EE, O2, Superdrug and Waterstones. The Wellington Retail Park adds to the retailers including Matalan, Bensons Beds, Tapi, ScS, Carpetright, M&S, TK Maxx, DfS, Pets at Home, the Food Warehouse, Home Bargains, Jollyes, Halfords, Sharps, Costa and Dreams. Sainsbury's also operate a large food store. These are not included within the GOAD Category report but all of these add to the centre's overall attractiveness and range.

(iii) Vacancy rates

The GOAD Category Report confirms that there were 36 vacant outlets in April 2023. This represented 20% of the total compared with the GOAD UK average of 14.1%. The above average number of vacant units within the town centre was also a feature in October 2016 when it stood at 13%. However it is clear that the majority of these units are concentrated within Wellington Way which in part is undergoing refurbishment with an upper floor being added to Units 25-34 and Units 99 and 101 London Road. This work has inevitably contributed to a high vacancy level within this part of the town centre with only 6 units (including Iceland) occupied. In addition the closure of Waitrose has also potentially impacted on the two additional units which have become vacant along Dukes Way.

Our visit to the town centre (June 2024) we recorded the following vacancy levels:

Table M; Vacancy rates by Primary and Secondary Frontages (June 2024)

Frontage	Primary or Secondary	Vacant units	% vacant	Position at April 2017
1-15 Dukes Walk and Waitrose	P	3/13	23.1	0/13
3-23 The Boulevard (odd)	P	1/11	9.1	4/11
4-18 The Boulevard (even)	P	0/8	0	3/8
93-119 London Road (odd)	P	2/14	14.3	4/14
278-310 London Road (even)	P	1/14	7.1	0/14
1-11 Wellington Way	P	7/10	70.0	3/10
12-21 Wellington Way	P	5/7	71.4	4/7
22-34 Wellington Way	P	8/9	88.9	3/9
2-14 Wellington Retail Park	P	0/6	0.0	0/6
75-81c London Road (odd) and 1-9 The Clock House	S	1/16	6.3	3/16
1-9 Queens Parade and 125 London Road	S	0/10	0	1/10
244-274 London Road (even)	S	0/17	0	1/17
1 The Boulevard and 310a-236 London Road (even)	S	0/9	0	2/9

In terms of the rest of the centre the vacancy levels within the primary and secondary areas have dropped particularly along London Road and within The Boulevard (see Photograph 4). The

³ A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers by GOAD, (i.e. those retailers most likely to improve the consumer appeal of a centre).

secondary shopping area of Nos. 1-9 Queen's Parade, Nos. 75-81c London Road and Nos. 310a-236 London Road also shows significant improvement in terms of this metric.

Photograph 4: The Boulevard



In terms of vacant floorspace the total is 8,036 sq.m. gross equating to 19.2% of the total. This compares with the GOAD average of 14.2%. Again this is largely accounted for by the vacant units at Wellington Way, the vacant Waitrose unit at The Dukes and Nos. 266-268 London Road (see Photograph 5) which is undergoing refurbishment. We understand that John Lewis and Partners are in discussion with the owner of the former Waitrose store with a view to exploring new uses for the building.

Photograph 5: Nos. 266-268 London Road currently undergoing refurbishment

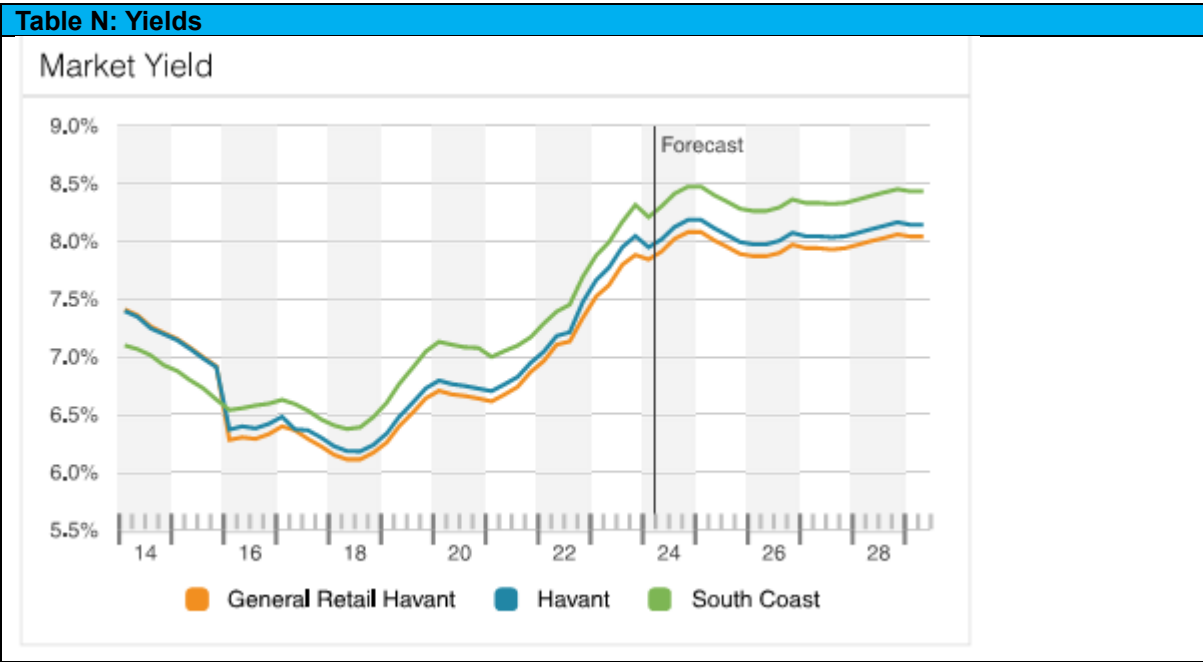


The total of vacant units has increased from the 2020 survey which based on a survey in April 2017, recorded 28 vacant units with the highest proportions within primary retail frontages: 3-23 The

Boulevard (36%), 4-18 The Boulevard (38%), 93-119 London Road (29%), 1-11 Wellington Way (30%), 12-21 Wellington Way (57%) and 22-34 Wellington Way (33%).

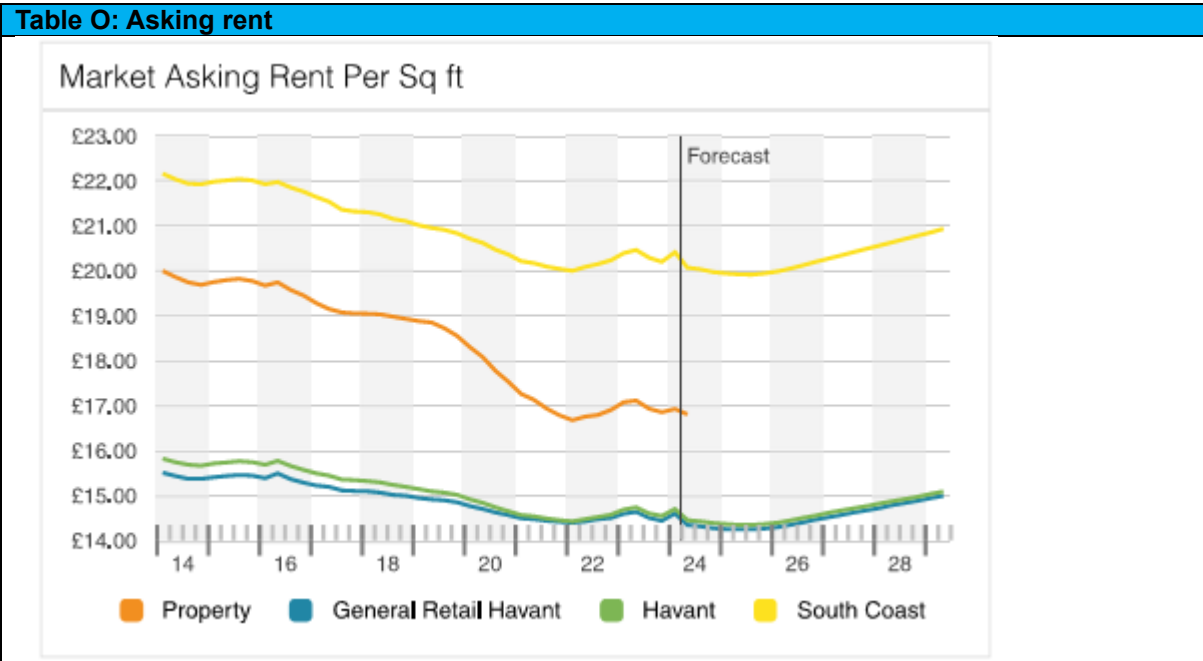
(iv) Yields and asking rents

There is no specific data on yields available on the CoStar database. However from Table N, average yields for general retail in Havant stand at 7.8% (Q2, 2024) compared with 7.9% for all outlets. Havant performs better than the South Coast region where average yields are 8.2%.



From Table O, asking rents stand at £16.9 sq.ft (Q2 2024) compared which is higher than general retail in Havant (£14.7 sq.ft). However it is slightly below the South Coast average of £20.4 sq.ft.

The rents have remained broad stable since the 2020 survey which recorded rents of between £12 and £15 sq.ft. between 2026 and Q2 2017.



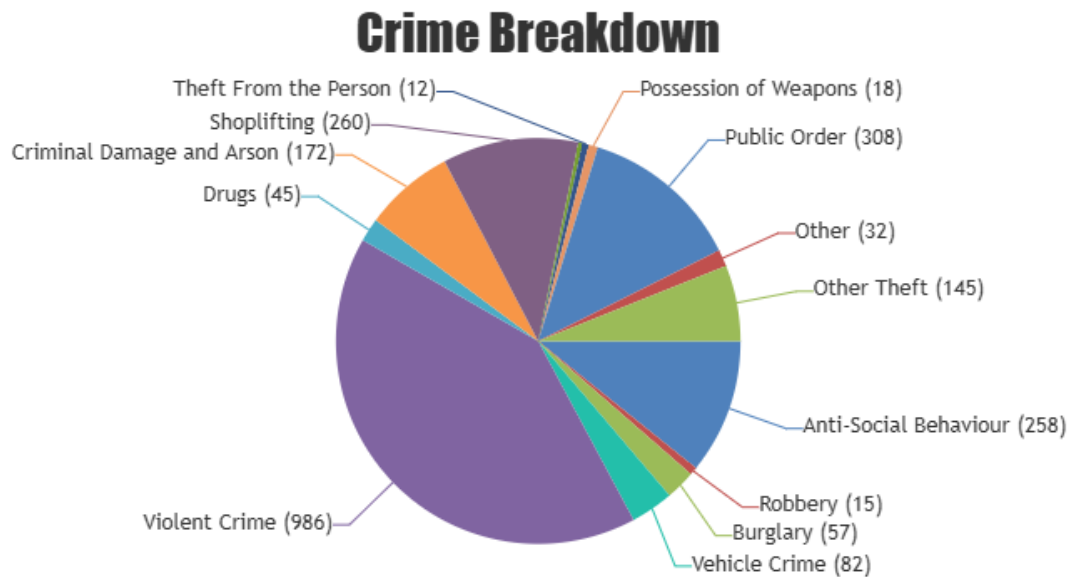
(v) **Crime**

Over the past 3 years incidents of all forms of crime and ASB have remained relatively constant averaging approximately 9%. For Waterloooville North, in March 2024 it was ranked 4th lowest for crimes per 1000 population with Waterloooville South having the lowest rate of all neighbourhoods within a radius of 5 miles. Table (indicates that the total recorded crime rate has remained relatively static over the past 3 years.

Table P: Total crimes recorded in Waterloooville North July 2021- March 2024

Quarter	Total	Percentage
Jul - Sep 2021	637	9.4%
Oct - Dec 2021	660	9.7%
Jan - Mar 2022	628	9.3%
Apr - Jun 2022	630	9.3%
Jul - Sep 2022	670	9.9%
Oct - Dec 2022	552	8.1%
Jan - Mar 2023	579	8.5%
Apr - Jun 2023	635	9.4%
Jul - Sep 2023	632	9.3%
Oct - Dec 2023	546	8.1%
Jan - Mar 2024	606	8.9%

Figure 1: Type of crime by category in Waterlooville North (October 2022-September 2023)



Source: Waterlooville North - UKCrimestats (October 2022-September 2023)

Over the 12 month period there has been a fall in ASB from April 2023 to September 2023. Burglary has also declined although vehicle crime and violent crime have increased. Shoplifting most prevalent along London Road has also risen. All crime including ASB has risen slightly from 93 recorded incidents in October 2022 to 129 in September 2023.

(vi) Accessibility

The town centre is highly accessible by car from the A3(M)/M27 and A3. The town is served by a range of car parks including:

Dukes Walk Shopping Centre	255 spaces (free for first 2 hours)
Wellington Way	101 spaces
Waterlooville Central	70 spaces (2 hours - £1)
Rockville Drive	70 spaces (2 hours - £1.20)
NCP	9 spaces (2 hours - £2.45)

In addition Asda and Wickes have dedicated car parking which can also facilitate trips to the town centre. Wellington Retail Park also provides surface level car parking and also affords access into the rest of the town centre.

With regard to public transport the main services to other centres include:

No. 7 – Portsmouth-Cosham-Purbrook-Waterlooville-Cowplain-Wecock

No. 37 – Havant-Purbrook-Waterlooville- Cowplain-Horndean- Petersfield

The town does not have direct access to a train station, the nearest being at Havant which provides services to London (Waterloo), Portsmouth, Southampton and Brighton.

(vii) Environmental Quality

The town centre is dominated by the road network although in the town centre itself shoppers and visitors have accessed to pedestrianised streets along London Road, Wellington Walk, The Dukes Shopping Centre and The Boulevard Precinct.

The Council is considering the preparation of a Masterplan for the town centre (potentially adopted in 2025 as a SPD⁴) which would seek to improve the public realm and improve pedestrian, cycling and public transport routes. In addition to the construction of a landmark building acting as a destination, the Masterplan is also considering adding outdoor spaces for markets, outdoor cinema, music or theatre.

Meanwhile uses are also being considered for vacant units to increase the active retail frontages as well as encouraging pop-up markets and retail uses. The Council has allocated £150,000 of funding to the Waterlooville Vacant Shop Scheme to assist with fitout costs. This encompasses the whole of the town centre apart from the retail park.

Overall conclusions

In terms of our overall assessment of the health of the town centre we have summarised this in Table Q

Table Q: SWOT analysis

Strengths	Weaknesses
- The inclusion of the Wellington Retail Park and Sainsbury's superstore provide key anchor retailers which together with the available free car parking add significant vitality to the centre - Asda also provides a key anchor food retailer which with its dedicated car park provides the opportunity for shoppers to undertake linked shopping and other trips. - Convenience goods retailing is generally buoyant and above GOAD UK averages despite the closure of Waitrose. - While vacancy rates have increased as a consequence of the refurbishment of Wellington Way, other primary and secondary frontages within the centre have remained relatively stable or have improved. - Comparison goods retailing within the 'traditional' town centre is at the GOAD UK average. - Town's economy supported by a range of sectors including leisure services and financial and businesses outlets - Good range of surface level car parks	- There has been an increase in vacancy rates in part due to Covid-19 and economic conditions. The refurbishment of Wellington Way has also undoubtedly contributed to the higher vacancy rate with only 6 units currently occupied. - Generally poor public realm with low inter-connectivity - Vacancy rate consistently above UK average - Limited night-time economy - High proportion of takeaway uses

⁴ An initial exhibition took place in March 2024.

- Yields in Havant better than south coast average indicating business demand and interest in appropriate space. - It is accessible particularly by car and car parking is readily available. - Signs of private sector investment in Wellington Way and Nos. 266-269 London Road.	
Opportunities - Scope for enhancing public realm, accessibility and general attractiveness of the town centre through emerging Masterplan - Improve night-time economy and cultural events - Improve retail provision to increase retention of locally generated expenditure to support new investment and jobs. - Consolidate Class E(a) within the town centre	Threats - Continuing investment in higher order centres of Southampton and Portsmouth - Limited catchment serving predominantly local needs - Loss of comparison goods expenditure outside town's catchment with no immediate short-medium term solution

Overall we conclude that the centre remains relatively robust with on-going private sector investment and future public sector investment planned as part of the preparation of a Masterplan. Asking rents and yields are also at or better than the borough average.

The centre could undoubtedly benefit from a focal landmark building and public square which would reinforce the partly pedestrianised London Road. The Wellington Retail Park which is fully occupied (apart from one small unit occupied by Bed Space) contributes significantly to its health both in terms of the range and quality of the retailers, the Sainsbury's superstore and surface level car parking.