
LEISURE AND RETAIL STATEMENT

ON BEHALF OF



IN RESPECT OF THE SITE AT:

WATERLOOVILLE –FORMER BAE SITE,
ELETTRA AVENUE

PLOT E

08 JULY 2015



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Contents

1. Introduction
2. Site and Context
3. Planning History
4. Policy
5. Proposal
6. Leisure Assessment
7. Retail Impact Assessment
8. Retail Sequential Appraisal
9. Conclusion

Appendices

1. Site Location Plan
2. Turnover of the Proposal
3. Surplus Expenditure
4. Sequential Assessment: Waterlooville Town Centre and Cowplain District Centre
5. Retail Impact
6. Waterlooville Town Centre Heath Check

1 INTRODUCTION

- 1.1 This leisure and retail statement has been prepared by Rapleys LLP on behalf of Hargreaves Properties Limited, in respect of a planning application for the change of use of E Block (the 'proposal') at plot E (the 'plot') at the former BAE Systems Technology Park, Elettra Avenue, Waterlooville (the 'park'). Specifically, planning permission is sought for the:

"Use of the building for leisure (class D2) and/or non food retail (class A1) purposes with associated car parking and other works"

- 1.2 The application relates to 4,725 sqm of floorspace, and whilst occupiers are sought for the site, it seeks maximum flexibility in order to allow the building to accommodate either use in totality, or a combination of the two uses.
- 1.3 The application site boundary (the 'site') and the park are detailed on the plan attached at **Appendix 1**.
- 1.4 As the local authority is aware, Hargreaves acquired the freehold of the park in January 2014, and are committed to delivering its beneficial economic re-use. As part of this commitment, our client has submitted a planning application to facilitate necessary infrastructure by way of the provision of a vehicular route through the park to serve future redevelopment. This proposed route is designed to serve the eastern half of the park at this stage, including plot E.
- 1.5 To inform the context of this proposal, in parallel to this application a second iteration of the Concept Masterplan for the park has been submitted, which provides illustrative detail of future development at the park and the wider context of this planning application. This Concept Masterplan includes detailed commentary relative to the applicant's initiatives to attract leisure occupiers to the site.
- 1.6 This study has been prepared at the request of the local authority, notwithstanding that the site is specifically allocated for employment development (as defined within the NPPF) within the Development Plan, and notwithstanding that the NPPF is clear that "town centre development", including retail, is "economic development".
- 1.7 To facilitate the necessary permission, this study addresses;
- The site's context and planning history;
 - The proposal;
 - The relevant policy background, including evidence base documents;
 - An assessment relative to leisure floorspace;
 - An assessment relative to retail impact;
 - An sequential appraisal relative to retail floorspace, and.
 - An assessment of the use of the floor space to include sequential and impact considerations.
- 1.8 The study concludes by advising that the application is acceptable in terms of the principle of the uses sought, and should be permitted.

2 THE SITE AND CONTEXT

THE APPLICATION PLOT

- 2.1 The site is part of, and constitutes the southern central part, of the wider former BAE Systems Technology Park. The site accommodates the only remaining structure on the park, and is a largely single storey, double height building extending to approximately 4,725 sqm at ground floor level, with an additional mezzanine level of approximately 2,000 sqm. The remainder of the site is cleared of buildings, structures and vegetation, and is relatively flat.
- 2.2 The application site red line boundary encompasses 0.985ha, and is illustrated on the site plan attached at **Appendix 1**.

THE FORMER BAE SYSTEMS TECHNOLOGY PARK

- 2.3 The park was formerly operated as the BAE Systems Technology Park and comprises 5.15ha of previously developed land, to the north-west of Waterlooville Town Centre.
- 2.4 In addition to E Block, the park formerly comprised the following buildings:
- Main Building – A three storey-complex accommodating 19,498sq.m of Class B1(c) research and development use
 - An ancillary Restaurant – 973sqm
- 2.5 These buildings formerly served as research and development facilities for BAE and were demolished in 2013 and – apart from E Block – the site is cleared and vacant.
- 2.6 However the applicant has aspirations to develop the park at the earliest possible juncture, and has already submitted a planning application for a vehicular route through the park in order to enable future development on individual plots, including the application site.

SURROUNDINGS

- 2.7 Immediately to the south of E Block is Beam Block, a single storey building that is not in the ownership of Hargreaves, and does not form part of its future aspirations for the site.
- 2.8 More widely, the site and park are surrounded by a mix of uses. To the immediate north and east, there are commercial premises (including the WKB car showroom and garage), offices, warehousing and residential development. Further to the north there are substantial areas of residential development and open land. To the south and west respectively, is open land beyond the commercial development immediately neighbouring the Site.

CONTEXT

- 2.9 The park lies just over 300m from the secondary shopping frontage of Waterlooville Town Centre (and therefore the primary shopping area of Waterlooville), and less than 150m from the Development Town Centre Boundary. However, these boundaries do not reflect the opening of the Sainsbury's store, which is just to the north of the secondary shopping frontage. If this store

was included within the shopping frontage, the park would be “edge of centre”. However, as this is not reflected in the Development Plan, for the purposes of this assessment the site is categorised as “edge of centre” relative to leisure development, and “out of centre” in terms of retail development.

- 2.10 The park is well connected to the town centre in terms of pedestrian links – a high-quality pedestrian crossing at the junction of Hambleton Road and Aston Road already exists. Further, the newly built Sainsbury’s development lies between the primary shopping area and the park. The site is situated between the town centre and Waterloooville’s main employment area, and the residential areas of Waterloooville which lie to the north of the town centre.
- 2.11 The park is therefore very well placed to accommodate uses which would complement the town centre, and would also assist in signalling arrival to Waterloooville town centre when travelling from the north.

3 PLANNING HISTORY

- 3.1 An outline application (Ref: APP/13/00893) for an alternative scheme was submitted by the previous owner of the park in September 2013. The application sought outline planning permission for the following development:

“Mixed-use employment, leisure and retail development to comprise demolition of Main Building and erection of Class C1 hotel, Class D2 cinema, 3No. Class A3 restaurants, Class A4 public house, Class A3/A5 drive-thru restaurant, Class A1 foodstore and retention of E Block for use as Class B1 offices or conversion to Sui Generis bowling complex, Class D2 health and fitness centre, and Class A3 restaurant”.

- 3.2 At a meeting in December 2013, the Planning Committee resolved to grant planning permission for the proposal, subject to the completion of a s.106 agreement. However, following extensive discussions relative to the s.106 agreement, the application was formally withdrawn by the Developer on 28th January 2015.
- 3.3 The application was withdrawn as it was not possible to secure occupiers as a result of the permission and associated s106 agreement, as the conditions and obligations were structured in a manner which rendered development, on a plot-by-plot basis, very challenging. As a result of this, the Developer has proposed an amended application approach for bespoke submissions for individual plots, enabled by a full planning application for a vehicular route through the park (and planning permission is anticipated relative to the route shortly).
- 3.4 Notwithstanding the withdrawal of the second application, evidently the proposed range of uses within this proposal were considered acceptable, in planning terms, by the local authority, thereby establishing the principle of a wide range of employment generating uses, including retail and leisure uses, at the park.

4 POLICY

- 4.1 This section provides a summary of the relevant planning policy, as set out by the National Planning Policy Framework (2012), the Local Development Plan for Havant Borough Council.

NATIONAL PLANNING POLICY FRAMEWORK

- 4.2 The Government published the National Planning Policy Framework (NPPF) on 27 March 2012.
- 4.3 It replaces the majority of Planning Policy Guidance and Planning Policy Statements which previously formed the national tier of planning guidance.

Achieving Sustainable Development

- 4.4 The NPPF outlines that the purpose of the planning system is to contribute to the achievement of sustainable development, and sets out three dimensions to sustainable development: economic, social and environmental (paragraph 7). In this respect, it identifies the need for the planning system to perform the following mutually dependent roles:
- An economic role – to contribute to the building of a strong, responsive and competitive economy, by ensuring sufficient land of the right type and location is available to support growth, and to identify and coordinate development requirements, including the provision of infrastructure;
 - A social role – to support strong, vibrant and healthy communities; to provide a supply of housing for current and future needs and to create a high quality built environment with accessible local services that reflect local community needs, and
 - An environmental role - to contribute to protecting and enhancing the natural, built and historic environment, which improves biodiversity, minimises waste and pollution and mitigates the impact on climate change and moves towards a low carbon economy.
- 4.5 Paragraph 9 states that to pursue sustainable development requires positive improvements in the quality of the built, natural and historic environment together with people's quality of life, including (but not be limited to):
- Making it easier for jobs to be created in cities, towns and villages;
 - Replacing poor design with good design, and
 - Improving the conditions in which people live, work, travel and take leisure.
- 4.6 The NPPF introduces a strong 'presumption in favour of sustainable development' as a 'golden thread' which should be seen as running through both plan-making and decision taking (paragraph 14). For decision taking this means:

- Approving development proposals that accord with the Development Plan without delay; and
- Where the Development Plan is absent, silent or relevant policies are out of date, granting permission unless:
 - Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this framework taken as a whole; or
 - Specific policies in the Framework indicate development should be restricted.

Core Planning Principles

4.7 Within the overarching roles that the planning system ought to play, the NPPF at paragraph 17 identifies a set of 12 core land-use planning principles which should underpin both plan-making and decision-taking. Amongst others, these confirm that planning should:

- Be plan led;
- Proactively drive and support sustainable economic development (which the NPPF defines, in its glossary, as development comprising B class, public/community and main town centre uses which, evidently, must therefore include retail);
- Always seek high quality design and a good standard of amenity;
- Support the transition to a low carbon future;
- Encourage the effective use of previously developed land, and
- Promote mixed use development and encourage the multiple benefits from land.

Delivering Sustainable Development - Building a Strong, Competitive Economy

4.8 Paragraph 18 outlines the commitment to secure economic growth in order to create jobs and prosperity. The NPPF continues that the planning system should operate to encourage and not act as an impediment to sustainable growth. It states that significant weight should be placed on the need to support economic growth through the planning system (paragraph 19) and that the NPPF aim is to ensure local planning authorities plan proactively to meet the needs of a modern economy (paragraph 20).

Delivering Sustainable Development - Ensuring the Vitality of Town Centres

4.9 In the context of retail development, the NPPF requires that planning applications for retail and other main town centre uses that are not in an existing centre, and not in accordance with an up-to-date local plan, be assessed on the basis of the sequential approach to site selection (paragraph 24) and impact assessment (subject to thresholds) under paragraph 26.

4.10 Paragraph 24 outlines a preference for main town centre uses to be located in town centres and then edge of centre locations, and only where suitable sites are not available should out of centre

sites be considered. When considering edge of centre and out of centre proposals, the NPPF advises that preference should be given to accessible sites that are well connected to the town centre. There is a requirement to demonstrate flexibility on matters such as format and scale by both applicants and local planning authorities.

4.11 The requirements for impact assessment are set out in paragraph 26. This confirms that assessments for retail (and leisure and office) development outside town centres which are not in accordance with an up to date development plan, and which are over a proportionate locally set threshold (or 2,500 sq. m if none apply), should address the following:

- The impact of the proposal on existing, committed and planned public and private investment in affected centre(s), and
- The impact of the proposal on town centre vitality and viability including local consumer choice and trade in the town centre and wider area (up to five years from the time an application is made).

4.12 Paragraph 27 of the NPPF states that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one or more of the tests, planning permission should be refused.

THE HAVANT DEVELOPMENT PLAN

4.13 The Development Plan consists of the Havant Borough Local Plan – Core Strategy (adopted March 2011), the Havant Borough Local Plan – Allocations (adopted July 2014) and the Local Plan Policies Map.

Local Plan – Site Allocations

4.14 The Development Plan consists of the Havant Borough Local Plan – Core Strategy (adopted March 2011), the Havant Borough Local Plan – Allocations (adopted July 2014) and the Local Plan Policies Map. The Local Plan Allocations document, within Policy WA2, has allocated the park as “land at BAE Systems Technology (Site Ref and Policy BD54)”, for mixed use development incorporating “economic development”, hotel and leisure.

4.15 The explanatory bullet points to Policy BD54 confirm that the site should be redeveloped for uses defined as “economic development” within the NPPF, including leisure uses and a hotel subject to viability. The bullet points further indicate that the site has potential for large scale leisure uses such as a bowling alley or cinema that could not be accommodated within the town centre.

Local Plan – Core Strategy

4.16 The Havant Borough Core Strategy (adopted March 2011), sets out the development framework for the Borough to 2026.

4.17 **CS4 (Town, District And Local Centres)** – the Council will seek to accommodate approximately 13,000 sq.m (net) of new comparison goods retail floorspace within town and district centres up

to 2016. Planning permission be granted for appropriate town centre development proposals that, inter alia, promote and enhance the hierarchy of identified centres.

EVIDENCE BASE: HAVANT BOROUGH COUNCIL TOWN CENTRES, RETAIL AND LEISURE STUDY 2009

- 4.18 This report was prepared in 2009 by NLP in order to, inter alia, provide an assessment of the future needs for additional retail and associated facilities in the borough.
- 4.19 The study divides the Borough into two parts, the western part (including Waterlooville and Cowplain centres) and an eastern part (including Havant, Emsworth, Leigh Park and Mengham/Gable Head Centres). Table 9c of this document provides a summary of comparison expenditure/floor space projections from 2008 to 2026. Including commitments, this table identifies the following levels of surplus expenditure:

Part of Borough	2016	2021
Havant Borough East	£52.70	£106.93
Havant Borough West	£22.15	£41.78
Total	£74.84	£148.71

Table 1

SUMMARY

- 4.20 From the foregoing commentary, the following key themes are drawn:-
- The development is allocated for uses, including retail and leisure, within the development plan;
 - Retail policy does not presume against out of centre floorspace. Rather, it allows for such floorspace to be consented, if the sequential and impact tests are satisfactorily addressed.

5 PROPOSAL

5.1 This application seeks full planning permission for:

“Use of the building for leisure (class D2) and/or non food retail (class A1) purposes with associated car parking and other works”

5.2 As previously detailed, the application relates to 4,725 sqm of gross external floorspace (as the existing mezzanine will be removed), and whilst occupiers are sought for the site, it seeks maximum flexibility in order to allow the building to accommodate either use in totality, or a combination of the two uses.

5.3 The final occupiers of the development evidently cannot be predicted at this stage. However, the applicant has conducted a marketing campaign to establish the demand for leisure uses on the site. Details of this marketing initiative are set out in the Concept Masterplan submitted to the local authority in parallel to this application. Examples of potential leisure occupiers within the building are:

- A cinema;
- A bowling alley; or
- A gym.

5.4 However, to date, despite a comprehensive marketing effort, we have not succeeded in attracting an appropriate cinema or bowling operator for the site. Nonetheless, the campaign continues but in the meantime the site will also be marketed to retailers, in accordance with the local development plan, in order to ensure E Block’s continued beneficial use (and to prevent its vacancy, which would be detrimental to the area and the prospects of securing future investment). Given the location and appointment of the site and its building, the most likely retail occupiers are likely to be bulky goods retailers. In these terms, the following condition is suggested for imposition onto any planning:

“Use Class A1 floorspace within this development should be used for the sale of DIY products (including materials and accessories), home improvement products, carpets and floor coverings, fabric, furniture, soft and hard furnishings, floor coverings, household goods, homewares, decorative products, glassware, cookware, kitchen utensils, white and electrical goods, automotive and cycle parts, pet food, garden tools, arts and crafts materials, variety retailing, tents, camping, caravanning, leisure and outdoor activity equipment, or related accessories for all of the aforementioned or the provision of ancillary café facilities, unless otherwise agreed with the Local Planning Authority.”

6 LEISURE ASSESSMENT

6.1 This proposal seeks permission for leisure use at the site. As previously confirmed, the site benefits from an allocation for such a use within the Development Plan. Further, and as previously confirmed, the site is well located to the town centre. In addition, the local authority's Planning Committee resolved to grant planning permission for leisure uses at the site, including those listed below, in December 2013.

6.2 On this basis, leisure use should be supported by the local authority, in principle.

6.3 However, in further support of this, the following comments are offered relative to leisure development. The comments draw heavily from the Harris Lamb assessment in support of the aforementioned planning application, which were evidently sufficient to enable the local authority's support.

6.4 The leisure uses assumed within this assessment are as follows:

- A cinema;
- A bowling alley, and
- A gym.

6.5 Evidently, if a leisure user can be secured, it might be within any of these, or other, uses within Use Class D2.

Existing Leisure Provision

6.6 There are no similar facilities in Waterlooville or its catchment area, as a result, the local authority's 2009 Town Centre Study identifies that 44% of people living within the Waterlooville catchment area visit the Odeon cinema at Port Solent (4.5 miles away), and 35% visiting the Vue cinema at Gunwharf Quays (7 miles away). A smaller percentage of people living in the Waterlooville catchment area travel to cinemas in Chichester.

Bowling Alleys

6.7 There are no bowling facilities within the Waterlooville catchment area, and the local authority's 2009 Town Centre Study identifies that 65% visit the AMF bowling facility at Havant Retail Park in Bedhampton.

Gyms

6.8 The local authority's Town Centre Study identifies that Waterlooville town centre has just two such facilities. It further identifies that 21% of residents in the catchment area visit the Fitness First at Dukes Walk, whilst 32% visit Waterlooville Leisure Centre. Other visits are outside the catchment area.

Impact of the Proposal

6.9 As previously identified, in terms of cinema and bowling complexes, people within the Waterlooville catchment area are entirely reliant on facilities outside Waterlooville catchment

area. The site is specifically mentioned within the Development Plan as being a suitable site for accommodating leisure development, in a readily accessible location with good linkage to Waterloooville town centre. Such facilities would enhance the offer of Waterloooville, whilst not diverting any expenditure from existing facilities within the Waterloooville catchment area. In terms of an additional private gym, it is considered that there is sufficient demand for an additional facility, which will assist in creating competition.

- 6.10 In summary, the proposed leisure development, if occupiers can be attracted to the site, will have a positive economic impact on Waterloooville, and will serve to complement and enhance the existing offer within the town centre.

7 RETAIL ASSESSMENT

General

- 7.1 The policy chapter, of this study, confirms that the site benefits from a specific allocation within the Development Plan for “economic development” within the NPPF. The NPPF confirms that retail use is economic development. As such, the retail element of the proposal should be considered, by the local authority, to be acceptable in planning terms as it would be consistent with the Development Plan.
- 7.2 This section of the study considers the proposals impact on the existing shopping network, and the sequential appraisal, relative to retail use. In applying these matters, the following benchmarks and assumptions are adopted:
- **Catchment Area** – Havant Borough West, as defined by the Havant Retail and Leisure Study 2009
 - **Expenditure and turnover date** – sourced from the Havant Retail and Leisure Study 2009
 - **Base Year** – 2015
 - **Design Year** – 2020 (five years from the date of the planning application)
 - **Price Level** – 2007 (as this is the price level within the aforementioned Havant Retail and Leisure Study)
 - **Gross Floor Space** – up to 4,725 sq.m
 - **Net Sales Area** – up to 3,150 sq.m (comprising approximately two thirds of the gross floor space)
 - **Estimated Sales Density** - £3,000 (based on a mid point of sales density for the following goods – carpets, DIY, electrical and furniture retailers. Source: Retail Rankings 2015)
 - **Estimated Turnover of Proposal** – up to £9,860,000
 - **Scope of Health Check** – Waterlooville
 - **Sequential Appraisal** – Waterlooville and Cowplain centres, and development sites identified in and around Waterlooville Town Centres and the Local Authorities Site Specific Allocations Document
- 7.3 The background calculations relative to the turnover of the proposal are attached at **Appendix 2**.
- 7.4 The above assumptions adopt a “worst case” scenario in a number of respects, not least as@
- The floorspace identified is a maximum, and would have the largest impact upon the existing shopping network, and
 - The sales density used is substantially higher than the average of the types of goods that are likely to be attracted to the site, and is higher than the three or the four identified categories.
- 7.5 Although the consideration of quantitative need is no longer a policy test for retail development, consideration of need can be applied to inform impact and the sequential appraisal. To this end, the table at **Appendix 3** confirms a surplus of expenditure of £27.15m in the catchment area, equivalent to approximately 9,000 sq.m of net sales floor space for retailers trading at the sales

density of the proposal. Given that the turnover of the proposal is estimated to be £9.86m, with a net floor space of 3,150 sq.m, the proposal represents approximately 36% of the forecast surplus expenditure forecast in 2020. This would suggest that neither impact, nor the sequential test, could be a particular concern to the local authority as the local shopping network has evident capacity to absorb the proposal.

Sequential Test

- 7.6 As previously reviewed, following the opening of the Sainsbury's to the north of the Wellington Retail Park, the site could be considered as edge-of-centre. However, as this movement of the primary shopping area has not been reflected within the retail frontages of the Development Plan, for the purposes of this appraisal the site is treated as out-of-centre.
- 7.7 Prior to the consideration of the sequential appraisal, it is important to acknowledge that:
- The site is allocated, within the Development Plan, as being suitable for a range of uses, including retail;
 - As previously identified, the proposal represents just over a third of the surplus expenditure anticipated by the local authority's retail study within Havant Borough West;
 - The site has excellent links to the town centre, and surrounding employment and residential development, and
 - The business models of the retailers who will occupy the site in accordance with the condition suggested by the applicant will be compromised if they cannot operate from large floor plates with adjacent surface level car parking (secured on competitive rents and rates, in order to deliver efficiencies and, thereby, keen prices to the customer).
- 7.8 These factors, in combination, underline a site specific need for the proposals at the site. This is a material consideration in the application of the sequential test, particularly as such need cannot be met elsewhere.
- 7.9 In considering whether a site is 'suitable' under the sequential approach the "Dundee" decision confirms that this means 'suitable for the development proposed by the applicant', rather than 'suitable for meeting identified deficiencies in the area'. As such, when considering the sequential test the relevant matter is whether the site is suitable for accommodating the type of retail development proposed (in this case, a Lidl discount foodstore/bulky goods retailers).
- 7.10 Further, a call-in decision by the Secretary of State in June 2014 (after the committee resolution relative to the previous application), known as the "Rushden Lakes" decision, confirms that developers should not need to alter or reduce the proposal to fit on an alternative site. In these terms, when considering other sites, only the ability for the "application" to be accommodated on alternative sites is relevant.
- 7.11 The following potential "opportunities" have been reviewed relative to the sequential appraisal:
- Vacant units within the primary shopping area of Waterlooville town centre and Cowplain district centre;
 - Sites within Waterlooville that are identified as development opportunities in the Development Plan, and

- Other sites within Waterlooville that are the subject of unimplemented planning permissions for retail development, or identified in the local authority's 2009 town centre study.

7.12 In these terms, to the extent that the cited “opportunities” render review, the findings are presented in **Appendix 4** (following analysis, and inspection, in April 2015).

7.13 In essence, the position can be summarised thus:

- None of the vacant units within Waterlooville town centre or Cowplain district centre are close to being suitable in size in order to accommodate the proposal. They should therefore be discounted, and
- The sites within Waterlooville identified in the Development Plan are not available, unlikely to be suitable in the context of the other development envisaged within the respective allocations and are not viable. As such, these sites should be discounted.

7.14 The assessment therefore concludes that there are no suitable sites which are available to accommodate the proposed development in a sequentially preferable location to the application site. Further, the development will

- Recycle an under-utilised brownfield asset;
- Maximise the opportunity, for linked trips, with the adjoining employment and mixed use development, and the emerging West of Waterlooville MDA, and
- Be accessible by non-car modes, as evidenced by the applicant's transport addendum statement.

Impact Assessment

7.15 Any retailer will trade, almost entirely, in comparison goods. In these terms, the marginal extent of comparison sales does not justify any detailed assessment. The proposal's relationship with the shopping network is considered in the table at **Appendix 5**.

7.16 In reviewing the table, the following points arise from the facilities identified:

- **Waterlooville** – it is anticipated that approximately a third of trade will be drawn from Waterlooville Town Centre, representing an impact of 2.7%, which will be barely, if at all, perceptible.
- **Cowplain** – given the types of retailers that are likely to be attracted to the site, and the nature of Cowplain as a district centre, impact to this centre will also be very limited at 2%.
- **Sainsburys Waterlooville** – it is envisaged that approximately 10% of the proposals trade will be drawn from the comparison sales element of this store, resulting in an impact of 9%. This level of trade draw should not be a concern to the local authority, given that the store lies outside an identified shopping frontage within the Development Plan, and given the store's remaining £27.4m of turnover in convenience goods (source: Retail Statement for the proposal), which will evidently be unaffected by the proposal.
- **Havant Borough East** – it is anticipated that 20% of the proposals trade will be drawn from this area, having a negligible impact at less than 1%.

- **Out of Borough** – the remaining 35% of trade is anticipated to be drawn from outside the borough.

- 7.17 Therefore, the proposal will not have any significant adverse impact on the established, policy protected, shopping hierarchy. Further, it should be recognised that the assessment represents a “worst case” scenario, as no allowance is given to improved market share to Waterlooville and Cowplain as a result of this proposal.
- 7.18 Further, as a sensitivity test, even if all of the proposal’s trade was drawn from Havant Borough West (including the Sainsburys Waterlooville), the trade draw would be considerably less than 10% of comparison turnover, and even lower across convenience and comparison turnover combined. This demonstrates the credibility of the assessment and, further, that the Council should have no concerns regarding impact.
- 7.19 The health check of Waterlooville Centre (at **Appendix 6**) provide additional evidence to confirm that the proposed scheme will respect the trading profile of these centres. They are both vital and viable, and well able to manage the marginal impacts arising from the proposed development. Further, they will evidently continue to provide non-retail town centre services which will ensure that they will continue to attract footfall and expenditure.

8 CONCLUSIONS

8.1 The following conclusions are drawn in this case:

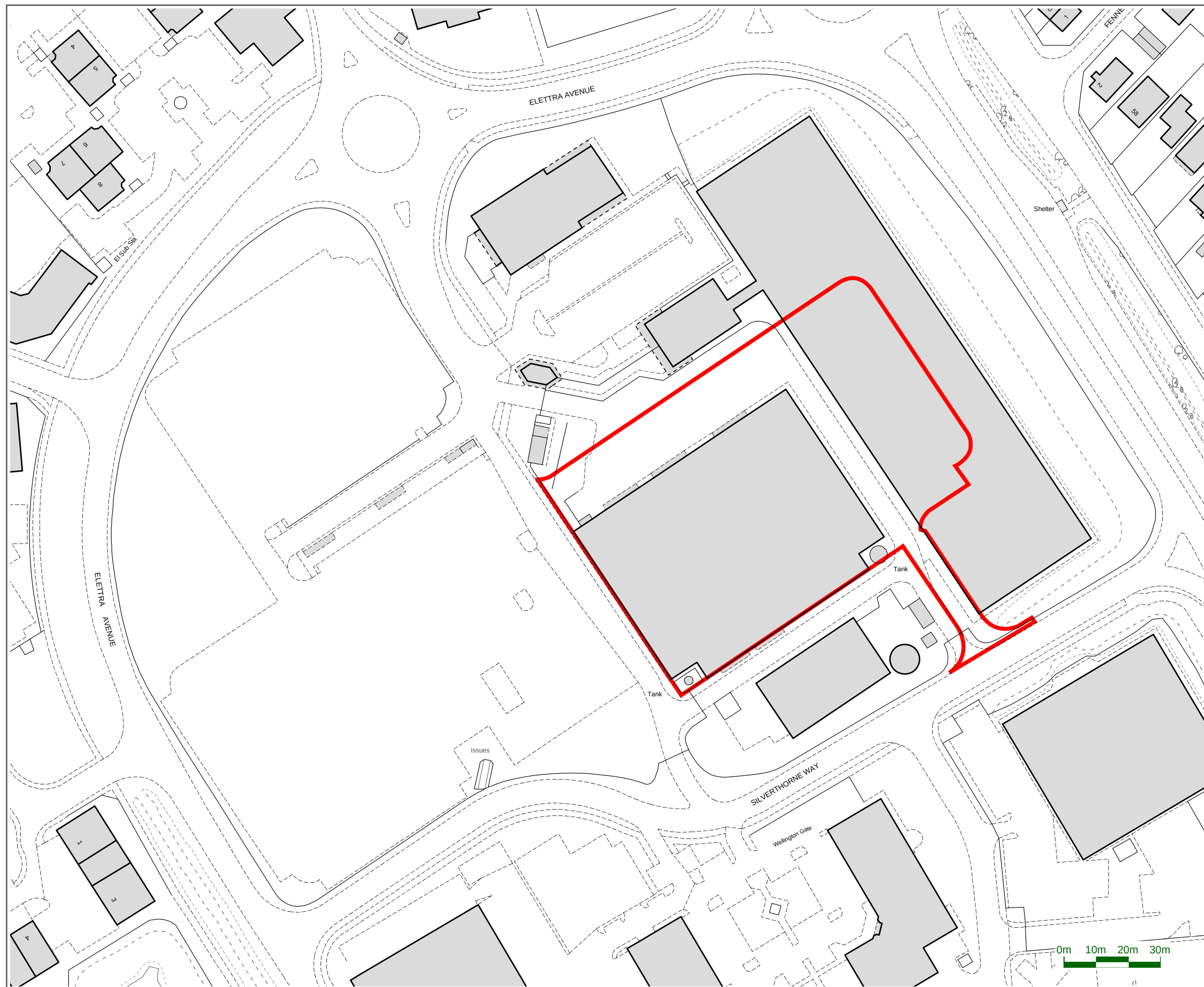
- The site is ripe for redevelopment. It presently fails to make any contribution to the social, economic and visual amenity of the area. The application proposals will secure the beneficial re-use of the site, with resultant sustainable benefits (whilst, further, signalling arrival at the northern gateway to Waterlooville);
- The site is allocated for uses including leisure and retail within the development plan, but even if this were not the case, retail planning policy, at national and local level, provides for the objective assessment of proposals such as this;
- The proposed leisure floorspace on the site will have a positive impact on Waterlooville town centre, and the site is the best location for accommodating it;
- The proposal will not cause any significant adverse impact to the policy protected shopping hierarchy. Rather, the proposal will have an acceptable relationship to relevant centres, which have been assessed to be vital and viable, and
- The proposal satisfies the sequential test. It has been assessed relative to 10 sites which are unable to accommodate the proposal (on availability, suitability and viability grounds). There are, consequently, no sequentially preferable sites.

8.2 The proposal, therefore, satisfies national and local leisure and retail planning policies. It is acceptable in these terms.



Appendix 1
Site Location Plan





SITE LOCATION PLAN
Elettra Avenue,
WATERLOOVILLE. PO7 7XS.



Scale @ A3 : 1:10,000

Plan No. : 286/36/1 _SLP05

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0m 10m 20m 30m



Appendix 2
Turnover of the Proposal





TURNOVER OF THE PROPOSAL

Gross Floor Area	Net Sales Area	Sales per square metre of net sales area (in 2013/2014, at 2015 prices)	Turnover of proposal (2015 prices)	Turnover of proposal (2007 prices)
4750 sqm	3150 sqm	£3,000	£9,450,000	£9,860,000

Notes:

Net sales area - 66% of gross floor area

Sales per square metre - based on a mid-point sales density of the following goods: carpets, furniture, DIY and electrical (Source: Retail Rankings 2015)

Price levels sourced from Experian Retail Planning Briefing Note 12 (October 2014)

Appendix 3
Surplus Expenditure



SURPLUS EXPENDITURE

Year	Available Expenditure (£M)	Turnover of Existing Floorspace (£M)	Turnover of Commitments (£M)	Turnover of Commitments and Sainsbury's Waterloooville (£M)	Surplus Expenditure (£M)	Surplus net sales floorspace (sqm net)
2016	144.65	118.20	4.30	15.26	11.19	3,730
2021	173.74	127.33	4.64	15.60	30.81	10,270
2020	167.92	125.50	4.57	15.53	26.89	8,962

Notes:

2007 Prices, all data for Havant Borough West (Waterlooville and Cowplain)

Available expenditure, turnover of existing floorspace and turnover of commitments 2016 and 2021 - source Table 9c, Appendix B, Havant Retail Study 2009

Available expenditure, turnover of existing floorspace and turnover of commitments 2020 - pro-rata figure 2016 between 2021 growth

Sainsbury's Waterloooville comparison turnover £10.96m - Source: Sainsbury's retail study (adjusted from 2008 to 2007 prices)

Surplus sales floorspace based on £3,000 per square metre of net sales area

Appendix 4

Sequential Assessment: Waterloooville Town Centre and Cowplain District Centre



RETAIL SEQUENTIAL SITE ASSESSMENT IN WATERLOOVILLE

No.	Site Address	Local Plan Allocation/Designation & Retail Centre Definition	Approximate Site Area (ha)/Floor area (sqm)	Availability	Suitability	Viability
1	Former Curzon Rooms, 310A London Road, PO7 7DU (W56)	<u>Adopted Havant Local Plan (Allocations) 2014</u> - Housing (14 dwellings) - Main Town Centre uses <u>Retail Centre Definition</u> Within Town Centre Boundary and secondary frontage. <u>Planning History</u> Planning permission was granted in 2008 14 residential units and 3 retail units (with a combined floorspace of 954 sq.m). This permission has not been implemented and has therefore expired.	0.24ha	Site is in existing use as a public car park. There is no evidence, such as marketing boards or listings on relevant websites, to suggest that the site is currently on the market. The site is therefore not available.	The entire site area comprises only 50% of the floorspace of Block E. The entire retail floorspace granted planning permission in 2008 represents only 20% of the floorspace of Block E. The site is therefore not sufficient to meet the sales and non-sales floorspace requirement of any proposed retailers that are likely to be occupying Block E. Given the site's location and appointment, there is very limited flexibility to accommodate the proposed retail development. Particularly given the policy aspirations for residential development on the site, there is limited scope for surface level car parking, or for a servicing area.	The site currently provides the town centre with a significant amenity by way of a public car park. Such a facility would need to be relocated if the site was to be re-occupied, and we would question whether any developer would consider this a realistic development opportunity. Furthermore, the site is not available or suitable, and therefore cannot be viable.

					Therefore, the site does not need the servicing arrangement of any of the likely occupiers of Block E. As the site is currently identified for a mixed-use scheme comprising town centre uses and residential within the Development Plan, this site is unlikely to be suitable for the occupiers that will wish to occupy Block E.	
2	Asda, Hambledon Road PO7 7XR / Clock Tower, London Road PO7 7HE (W109) This site can, affectively, be divided into two discreet parts, as follows: The eastern parcel, comprising the Clock Tower building, at the junction of Hambledon Road	<u>Adopted Havant Local Plan (Allocations) 2014</u> - Housing (No net dwelling increase) - Main town centre uses <u>Retail Centre Definition</u> Within town centre boundary. Eastern parcel – secondary shopping frontage within town centre boundary. Western parcel – within town centre	Eastern parcel area 0.285ha Western parcel area 2.935ha	Both sites are in existing and beneficial use, and there is no evidence that either parcel is currently on the market, neither site is therefore available to potential occupiers of Block E. The site is therefore not available.	<u>Eastern Parcel (see Site 1)</u> Given the site's location and appointment, there is very limited flexibility to accommodate the proposed retail development. Particularly given the policy aspirations for residential development on the site, there is limited scope for surface level car parking, or for a servicing area. Therefore, the site does not meet the servicing arrangements of any of the likely occupiers of Block E.	The presence of existing businesses on the site, which would be required to relocate in order to accommodate this development, is unlikely to prove viable. There are likely to be significant costs associated with relocation/compensation if the site is to be reoccupied, and we would question whether any developer would consider this realistic development opportunity. Moreover, alternative sites would need to be identified for those businesses being relocated.



	and London Road, and • The Western parcel, comprising the Asda superstore and Waterlooville Community Centre. Given that both of these parcels are unrelated to one another in terms of occupation, legibility, operation or even type of retail/land use, it would not be appropriate for this sequential analysis to treat them as a single site.	boundary, albeit outside any identified frontages. The western parcel is relatively isolated from the wider town centre as a whole. Although there is a somewhat pedestrian link between Hambledon Road and the Asda food store, this is relatively eligible and the Asda is a relatively isolated, car based facility. <u>Planning History</u> There have been no planning applications for the redevelopment of either parcel since 1991.			<u>Western Parcel</u> This parcel is not within the Primary Shopping Area. Moreover, the mixed use development, including residential envisaged within this planning policy is likely to be incompatible with the form of retail that is likely to be attracted to Block E. This would be particularly the case if the Asda store would remain in situ, either as it currently is or as a redeveloped offer.	The redeveloped site would appear to offer little scope for occupation by retailers such as those for Block E. The site is not available or suitable and therefore cannot be viable.
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3	Wellington Way, PO7 7ED (W110)	<u>Adopted Havant Local Plan (Allocations) 2014</u> - Housing (No net dwelling increase) - Main town centre uses <u>Retail Centre Definition</u> Within town centre boundary. Within primary frontage. <u>Planning History</u> The only applications relate to the site in its current form and use. There have been no applications for its redevelopment.	1.11ha	The site is in existing and beneficial use as a shopping precinct and town centre car park, and there is no evidence that the site. The site is therefore not available to potential occupiers of Block E. The site is therefore not available.	The site is roughly comparable in size to the area of Block E (1.09ha). Given the site's shape and appointment, there is very limited flexibility to accommodate the proposed retail development. Particularly given the policy aspirations for residential development on the site, there is limited scope for surface level car parking, or for a servicing area. Therefore, the site does not need the servicing arrangement of any of the likely occupiers of Block E.	The existing businesses on the site, which would be required in order to accommodate this development, is likely to be problematic in order to ensure the site's viability. There will likely be significant costs associated with relocation/compensation if the site was to be reoccupied, and we would question whether any developer would consider this realistic development opportunity. Moreover, alternative sites would need to be identified for those businesses being relocated. The site is not available or suitable and therefore cannot be viable.
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4	West of Asda/ Blue Star Site	<u>Adopted Havant Local Plan (Allocations) 2014</u> - Housing (50 dwellings) - Main town centre uses <u>Retail Centre Definition</u> Within town centre boundary. <u>Planning history</u> The only planning history for the site appears to relate to works to trees.	1.191ha	There is no evidence that the site is being marketed and therefore the site is not available. However, it is understood that the landowner is promoting the site for predominantly residential development.	The site is not in the town centre in terms of retail use. Therefore, in policy terms the sequential test would apply to retail development at this site. Further, as with the former BAE site, it is on the other side of a dual carriageway. However, in comparison, links to the town centre are considerably less well established between the Primary Shopping Area and the Blue Star site. Given the quantum of residential development promoted by the landowner, the site would be unsuitable for the type of retailer that are likely to be attracted to Block E, in terms of car parking and servicing arrangements.	The site is not suitable or available, therefore it cannot be a viable alternative for the proposed development.
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5	Unit 1 The Clock House, PO7 7HE	<u>Adopted Havant Local Plan (Allocations) 2014</u> - Part of the ASDA/Clock Tower allocation <u>Retail Centre Definition</u> Within town centre and secondary frontage.	172sqm	The site is currently on the market and is being marketed by Holloway, Liffe & Mitchell.	Given that the area accounts for only 3.6% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.
6	119 London Road, Waterloooville	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage. <u>Planning History</u> None recorded on the Council's website.	48sqm (estimate)	There is no evidence that the site is on the market. The site is therefore/is not available.	Given that the area accounts for only 1% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable. Consequently, it cannot be a viable alternative for the proposed development.



7	2 Queens Parade, PO7 7EB	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage. <u>Planning History</u> Change of use from A1 to adult gaming centre in 2012.	56sqm	The site is on the market, with Myddleton Major acting as agents.	Given that the area accounts for only 1% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.
8	3 The Boulevard, PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	112 – 230 sqm	The site is on the market, with Myddleton Major acting as agents.	Given that the area accounts for a maximum of 4.9% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.



9	10 The Boulevard, London Road PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	48sqm	The site is on the market, with Myddleton Major acting as agents.	Given that the area accounts for only 1% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.
10	13 The Boulevard, PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	72sqm	The site is on the market, with Myddleton Major acting as agents.	Given that the area accounts for only 1.5% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.



11	15 The Boulevard, PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	72sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for only a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is neither available nor suitable. Consequently, it cannot be a viable alternative for the proposed development.
12	16 The Boulevard, London Road, PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	45sqm	The site is on the market, with Myddleton Major acting as agents. The site is available	Given that the area accounts for only 0.95% of the Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable. Consequently, it cannot be a viable alternative for the proposed development.



13	17 The Boulevard, PO7 7DT	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	77sqm	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for only a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is neither available nor suitable. Consequently, it cannot be a viable alternative for the proposed development.
14	6 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for only a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is neither available nor suitable. Consequently, it cannot be a viable alternative for the proposed development.



15	9 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70sqm	The site is currently on the market and is being marketed by Hughes Ellard.	Given that the available floorspace accounts for 1.5% of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
16	10 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70sqm	The site has previously been marketed by Hughes Ellard, however, it is not being actively marketed on the company's website. The site is not therefore considered to be available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



17	14 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70 sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
18	15 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70 sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



19	17 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	80sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
20	34 Wellington Way, PO7 7ED	<u>Adopted Havant Local Plan (Allocations) 2014</u> Within Wellington Way allocation. <u>Retail Centre Definition</u> Within town centre, primary frontage.	70 sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



21	278 London Road, Waterlooville	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, primary frontage.	98sqm	The site has previously been marketed by Hughes Ellard, however, it is not being actively marketed on the company's website. The site is not therefore considered to be available.	Given that the available floorspace accounts for only 2% of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
22	250-252 London Road, Waterlooville	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Within town centre, secondary frontage.	128sqm	The site is currently on the market and is being marketed by Goadsby.	Given that the available floorspace accounts for only 2.7% of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



23	244 London Road, Waterlooville	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Secondary frontage	85sqm (estimate)	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for a small proportion of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
24	81c London Road, PO7 7EL	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Secondary frontage.	243sqm	The site is currently on the market and being marketed by Hellier Langston.	Given that the available floorspace accounts for only 5% of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer at Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



25	79 London Road, PO7 7EL	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Secondary frontage	37sqm	The site is currently on the market and is being marketed by Garner Wood.	Given that the available floorspace accounts for only 0.8% of Block E, there is no provision of surface level car parking, and a pedestrian/bus only route restriction in front of the units, the site fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
26	Retail 'pod' 1 , Wellington Retail Park, 2 Hambledon Road, PO7 7FG	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> None	140sqm	The site is currently under construction, however, a future occupier appears to have already been secured for this unit, Costa.	The available floorspace for the unit accounts for 3% of Block E. The site therefore fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable or available for the development. Consequently, it cannot be a viable alternative for the proposed development.



27	Retail 'pod' 2 , Wellington Retail Park, 2 Hambledon Road, PO7 7FG	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> None	95sqm	The site is currently under construction and is being marketed by Cushman and Wakefield.	The available floorspace for the unit accounts for 2% of Block E. The site therefore fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
28	Retail 'pod' 3, Wellington Retail Park, 2 Hambledon Road, PO7 7FG	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> None	111sqm	The site is currently under construction and is being marketed by Cushman and Wakefield.	The available floorspace for the unit accounts for 2.3% of Block E. The site therefore fails to meet the sales and non-sales floorspace and servicing requirements of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.



27	51 London Road, Cowplain, PO8 8UJ	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Secondary frontage in District Centre	70.3sqm	The site is currently on the market and is being marketed by Holloway, Iliffe and Mitchell	Given that the available floorspace accounts for only 0.64% of Block E, there is no provision of surface level car parking and constrained servicing arrangements. The site fails to meet the sales and non-sales floorspace of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.
28	41-43 London Road, Cowplain, PO8 8DF	<u>Adopted Havant Local Plan (Allocations) 2014</u> None <u>Retail Centre Definition</u> Secondary frontage of the district centre	Approx. 180sqm	There is no evidence that the site is on the market. The site is therefore not available.	Given that the available floorspace accounts for only 1.7% of Block E, there is no provision of surface level car parking and constrained servicing arrangements. The site fails to meet the sales and non-sales floorspace of any likely retailer in Block E. In light of the above, the site is not suitable for the proposed retail development.	The site is not available or suitable for the development. Consequently, it cannot be a viable alternative for the proposed development.

Appendix 5
Retail Impact



RETAIL IMPACT

Facilities	Turnover 2016 £m	Turnover 2021 £m	Turnover 2020 £m	Trade Draw %	Trade Draw £m	Resultant Turnover £m	Impact %
Havant Borough West							
Waterlooville	113.66	122.40	120.65	33	3.25	117.40	2.70
Cowplain	4.54	4.89	4.82	2	0.20	4.62	4.09
Sainsburys Waterlooville	n/a	n/a	10.96	10	0.99	9.97	9.00
Havant Borough East	230.39	248.53	244.90	20	1.97	242.93	0.81
Outside Borough	n/a		n/a	35	3.45	n/a	n/a
			Totals	100	9.86		

Notes:

2007 Prices

Year 2020

Turnover 2016 and 2021 - source Table 9c, Appendix B, Havant Retail Study 2009, excluding commitments

Sainsbury's Waterlooville comparison turnover £10.9m - Source: Sainsbury's retail study, adjusted from 2008 to 2007 prices

Appendix 6
Waterlooville Town Centre Health Check

WATERLOOVILLE TOWN CENTRE HEALTH CHECK

CONTEXT

Waterlooville Town Centre is located in Havant and is located approximately 9 miles north of Portsmouth. The adopted Core Strategy (2011) seeks to promote and enhance the hierarchy of identified centres including Waterlooville Town Centre.

Waterlooville Town Centre comprises over 160 retail and service units. The primary shopping area consists of 93-119 London Road, Wellington Way, The Precinct, Dukes Walk and Wellington Retail Park.

The secondary retail areas include Queens Parade and 125 London Road, 310-326 London Road, 75-81 London Road, the Clock House (on the junction of London Road and Hambledon Road and 244-274 London Road.

DIVERSITY OF USES

The table below shows the composition of Waterlooville Town Centre by number of units.

Table 1 – Waterlooville Town Centre Retail Sector Breakdown

		Percentage of total units	
Sector	No of units	Waterlooville	National Average
Convenience	15	9.2%	8.4%
Comparison	63	38.7%	32.4%
Service	69	42.3%	45.8%
Vacant	21	12.9%	11.4%
Total	163		

Class A1 comparison units represent approximately 39% of the available floorspace. This is higher than the national average by around 32%. The main comparison goods floorspace in town is located at the Wellington Retail Park, where Harveys, Home Bargains, DFS, Matalan, Argos, Brantano, SCS, Carpet Right, TK Maxx, Sainsburys, Halfords and Dreams are located. The Dukes Walk shopping area also provides significant comparison retailers to the south of London Road and is where a number of national multiple occupiers are located.

In general terms, the balance of retailers in Waterlooville town centre is broadly comparable to the national average.

In terms of vacancies, the percentage is broadly consistent with the national average. Further, the majority of vacant units are small and as such the percentage of vacant units by floorspace will be considerably lower. In any event a degree of vacancy within a town centre is necessary to allow movement in retail units.

POTENTIAL CAPACITY FOR EXPANSION

Havant Borough Council's Town Centre, Retail and Leisure Study (2009), prepared by Nathaniel Lichfield identified a need for an additional 13,288sqm net comparison retail floorspace in the borough (up to 2016).

Within the adopted Allocations Plan (2014), five sites are identified for mixed use development schemes to include all main town centre uses and residential development. Therefore, Waterlooville town centre has capacity to expand its offer albeit at present no planning applications are being promoted on any of these sites.

RETAILER REPRESENTATION AND INTENTIONS TO CHANGE

Retail agents have been contacted to provide expert advice on interest in Waterlooville town centre. As with many town centres of this size, the national multiple retailers who at one time sought representation have now retrenched and tend to only expand within the top 150 retailing centres within the UK. However, Waterlooville still provides a draw for a number of occupiers although in the main their size and locational criteria differ significantly from that of traditional town centre occupiers. Additionally the town centre appears to lack larger units and is also characterised by discount style retailers such as Wilkinson, Poundland, M&Co and Store Twenty One.

In terms of requirements, the likes of Original Factory Shop, Maplin and PamPurredPets all have published requirements for the town although their preference may well be for edge or out of centre locations with car parking. Additionally their size requirements are a minimum of 6,000 sq ft, 2,500 sq ft and 3,000 sq ft respectively. Halfords and Topps Tiles also have requirements although they are very unlikely to consider the town centre, most probably requiring edge of centre or out of town retail / trade park locations. Finally Aldi has an outstanding published requirement for a minimum of 15,000 sq ft with car parking.

SHOPPING RENTS

Retail agents have been contacted to provide expert advice on rents in Waterlooville town centre. The level of rent that retailers are prepared to pay for town centre units is an important aspect of assessing the viability of town centres. Transactional evidence suggests that the average prime 'High Street' retail rents sit in the region of £35 - £40 Zone A, with lower values associated with

less prominent locations. The rental tone at the Dukes Walk Shopping Centre is marginally higher with Zone A rents reaching £42-43 Zone A.

While there has been a marginal fall in rental values, the very limited vacancy rates in the prime areas of the town, namely the north end of London Road and Dukes Walk provide a good indicator of the vitality of the town. Furthermore, the current vacancy levels along the Boulevard are not abnormal and can be explained by the comparatively small unit sizes which will preclude most national occupiers.

PROPORTION OF VACANT STREET LEVEL PROPERTIES

Table 1 identifies the level of vacant town centre floorspace, as at the time of our surveys in April 2015. This equates to 12.9% of the total available units, slightly more than the national average of around 11.4%.

14 vacant units are situated within the primary shopping frontage, as identified within the adopted allocations plan. The remaining vacant units are located within the secondary town centre frontage, at either end of the London Road. As previously discussed, this percentage is consistent with national averages, although it is exaggerated as the majority of units are small.

COMMERCIAL YIELDS FOR NON-DOMESTIC PROPERTY

Investments agents have provided their expert opinion on commercial yields in Waterloooville. Commercial yields are a recognised measure of viability but one that needs to be viewed in context. It does, however, provide an indicator of the confidence of investors in the long-term profitability of a centre for commercial developments. Discussions with agents suggest retail yields in the region 6.5% in spring 2015. Commercial yields around Waterloooville are gradually improving and are comparable to other south east regional centre, indicating continued retail recovery over the last 4 yrs, and the yield is considered appropriate for the size and retail offer of the centre, demonstrating long-term investor demand.

PEDESTRIAN FLOWS

The highest pedestrian flows, as witnessed at the time of our surveys were noted in Dukes Walk and on Hambledon Road. The busiest single location was the Dukes Walk development which is anchored by Waitrose and Wilkinson and includes a number of other national multiple retailers.

Elsewhere, we noted the pedestrianized area to the north of Hambledon Road is attractive to pedestrians, particularly given the range of street furniture provided. Footfall diminishes within the Wellington Way precinct, the Boulevard precinct and at either end of the London Road.

ACCESSIBILITY

Waterlooville benefits from a good road and public transport accessibility. Moreover there is a more extensive range of car parking in and around the town centre, comprising of over 815 car parking spaces, as detailed in the following schedule set out in Figure 2.

Table 2 – Schedule of Car Parks and Ownership

Name of Car Park	No Spaces	Council/Private owned
Wellington Way	124	Council
Rockville Drive	58	Council
Asda		
Napier Parking Ltd 310 London Rd	70	Private
Wellington Retail Park	559	Private
Swiss Road		

The main town centre stops are at 'Waterlooville Precinct' on Hambledon Road. The stops provide good access to the main town centre shopping areas of the Wellington Retail Park and the London Road. Subsidiary stops are provided on London Road, at the Wellington and additionally the number 7 bus stops on the Hambledon Road to the west of Wellington Retail Park.

Table 3 – Waterlooville Bus Routes – Description and Frequency

Bus	Stop	Route	Frequency
37	Waterlooville Precinct	Clanfield to Havant Liss Forest then via Clanfield, Horndean, Hazleton, Tempest Avenue, Waterlooville precinct, Frenstaple, Crookhorn, South Downs College, Leigh Park ending at Havant Bus Station	Every hour weekdays
39	Waterlooville Precinct	Havant to Petersfield Havant College, Purbrook, Leigh Park, Waterlooville, Horndean, Clanfield, Petersfield	Every 15min daytime weekdays
7	Waterlooville Precinct	Wecock Farm to Southsea - Wecock Farm via the Rainbow in Milton Road, Waterlooville precinct, Crookhorn, Cosham, Commercial road Portsmouth, South Parade Pier in Southsea	Every 10mins daytime weekdays
8	Waterlooville Precinct	From Drift Road in Clanfield to the Hard / Gunwharf Quays in Portsmouth via Horndean precinct, Cowplain shops, Waterlooville precinct, the Hampshire Rose in Widley, Cosham, Commercial road Portsmouth	15m on weekdays
X9	Waterlooville Precinct	Denmead to Portsmouth	Every 30 minutes daytime weekdays
145	Waterlooville Precinct	Hambledon - Denmead - Waterlooville - Havant - Emsworth Via - South Downs College - Hulbert Road	Every 30 minutes daytime weekdays



The centre also benefits from provision of cycle parking in the pedestrianized area of London Road. Motorcycle spaces are provided within the car parking spaces listed above.

PERCEPTION OF SAFETY AND CRIME

There is little evidence of vandalism, litter or graffiti and the centre is generally well-lit and surveyed.

Statistics from the UK Crime Statistics website for March 2015 confirm that the Waterlooville Central neighbourhood, in which the town centre is located has a higher crime rate than surrounding suburban areas, however, the crime rate is lower than Havant and a number of other local neighbourhoods.

The town centre is within the Waterlooville North Police neighbourhood area. Local policing priorities confirm that anti-social behaviour and non-dwelling burglary were the areas of highest concern in the Waterlooville north area. Such priorities are those that one would normally find in a town of this type and does not suggest that the town centre is unhealthy.

ENVIRONMENTAL QUALITY

The built environment of the town centre is predominantly 2 storey 20th century buildings. The London Road has a more traditional character, using materials such as brick. More modern shopping precincts at Wellington Way and the Boulevard are constructed in more modern materials such as concrete.

The majority of the London Road, between Hambledon Road and Hulbert Road is pedestrianized. Both Wellington Way and the Boulevard are also pedestrianized.

The public realm is generally well maintained, with little litter or vandalism. There is a good provision of street furniture (seating, litter bins, public art and a contemporary bandstand) on the pedestrianized area of London Road and in the Boulevard. It is noted that the premises in Wellington Way are generally less well-cared for which makes this precinct less visually appealing than the rest of the shopping areas.

SUMMARY

This detailed assessment of Waterlooville Town Centre indicates that it is healthy, relative to the indicators of vitality and viability outlined within the national Planning Practice Guidance.

The centre's attractiveness relates to the range of comparison goods retailers and is complemented by the services and convenience goods offer. A number of national retailers are seeking to occupy floorspace in Waterlooville.

The town centre is well-presented and there is good provision of street furniture, including cycle racks, litter bins and seating within the pedestrianized area of London Road, which are well-used.



Two small late 20th century precincts have a number of vacant units, however, this is more due to the small-scale of the units which are not attractive to national occupiers.