Retail, Leisure and Town Centres Study

Part 2 - Town Centres

Rushmoor Borough Council
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11051/05/PW/JeH

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1.0 Introduction

The Study

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned to prepare a joint Retail, Leisure and Town Centres Study on behalf of Rushmoor Borough Council and Hart District Council. The Study comprises two separate parts. Part 1 addresses the joint development needs of the two local authorities for retail, leisure and town centre uses. Part 2 provides an audit and review of the existing centres within the two separate authorities, as well as identifying the capacity of centres to accommodate the new town centre development requirements.

1.2 The key objective of the Retail, Leisure and Town Centre Study is to provide a robust and credible evidence base to inform both Councils' work on new local plans.

1.3 The key objectives of the Part 2 Study are to:

- undertake health checks of Farnborough and Aldershot town centres and North Camp district centre;
- review the town centre boundaries and frontages;
- appraise retail and leisure development sites within and adjacent to the town centres, and the capacity to accommodate identified needs; and
- undertake a review of policies and advise on strategy and recommendations.

1.4 These objectives are in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (NPPG). The NPPG provides advice on what town centre strategies should contain, and states that strategies should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. The NPPG identifies questions that town centre strategies should answer, including the following:

- what is the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period?
- what is the vision for the future of each town centre?
- can the town centre accommodate the scale of assessed need for main town centre uses?
- in what timeframe should new retail floorspace be provided?

1.5 The NPPG states that strategies should identify changes in the hierarchy of town centres, including where a town centre is in decline.

Conclusions of Part 1 Study

1.6 The Part 1 Study provides an assessment of the development needs of Rushmoor Borough and Hart District for retail, leisure and town centre uses. The principal conclusions of the analysis contained within this study relating to Rushmoor are summarised below.

1.7 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period, i.e. up to 2032.

1.8 When planning for growth in their centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

Floorspace Projections

1.9 The Part 1 Report includes different scenarios for population growth over the study period, adopting the latest ONS SNPP 2012 based projections, and as a sensitivity analysis, population projections from the Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment (SHMA). These different scenarios have implications for the floorspace projections. The higher SHMA population projections identify the retail floorspace requirements if all of the objectively assessed housing needs are met in full.

Convenience Goods Floorspace

1.10 The convenience goods projections (over and above commitments), based on adjusted markets shares, suggest new floorspace as follows:

Table 1.1: Rushmoor Convenience Goods Retail Floorspace Projections – ONS Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	558	140	646	631	1,975
Aldershot	n/a	n/a	456	597	1,053
North Camp	n/a	n/a	n/a	n/a	n/a
Other Rushmoor	n/a	n/a	1	n/a	1
Rushmoor Total	**558**	**140**	**1,103**	**1,228**	**3,029**

Source: Table 6.1, Part 1 Study.

Projections based on adjusted market shares from 2018 to reflect implementation of planned commitments.

Table 1.2: Rushmoor Convenience Goods Retail Floorspace Projections – SHMA Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	746	238	795	801	2,580
Aldershot	651	93	1,050	1,066	2,860
North Camp	n/a	n/a	n/a	n/a	n/a
Other Rushmoor	1	n/a	1	1	3
Rushmoor Total	**1,398**	**331**	**1,846**	**1,868**	**5,443**

Source: Table 6.2, Part 1 Study

Comparison Goods Floorspace

1.11 The comparison goods projections (over and above commitments), based on constant markets shares, suggest new floorspace as follows:

Table 1.3: Rushmoor Comparison Goods Retail Floorspace Projections – ONS Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	n/a	n/a	3,223	6,962	10,185
Aldershot	n/a	n/a	1,137	1,363	2,500
North Camp	31	46	84	90	251
Other Rushmoor	1	2	3	4	10
Rushmoor Total	**32**	**48**	**4,447**	**8,419**	**12,946**

Source: Table 6.5, Part 1 Study

Table 1.4: Rushmoor Comparison Goods Retail Floorspace Projections – SHMA Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	n/a	n/a	7,017	8,595	15,612
Aldershot	n/a	943	2,029	2,172	5,144
North Camp	48	62	110	117	337
Other Rushmoor	2	2	4	4	12
Rushmoor Total	**50**	**1,007**	**9,160**	**10,888**	**21,105**

Source: Table 6.6, Part 1 Study

Food & Beverage Floorspace

1.12 The Class A3/A5 food/beverage services projections, suggest new floorspace could be distributed as follows:

Table 1.5: Food and Beverage Floorspace Projections – ONS Population Projections

Location	Additional Food and Beverage Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	261	185	224	220	890
Aldershot	405	287	347	340	1,379
North Camp	57	40	48	47	192
Other Rushmoor	16	11	13	13	53
Rushmoor Total	**739**	**523**	**633**	**619**	**2,513**

Source: Table 6.9, Part 1 Study

Table 1.6: Food and Beverage Floorspace Projections – SHMA Population Projections

Location	Additional Food and Beverage Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	346	253	317	322	1,238
Aldershot	679	526	655	666	2,526
North Camp	65	47	58	58	228
Other Rushmoor	16	12	13	13	54
Rushmoor Total	**1,106**	**838**	**1,043**	**1,059**	**4,046**

Source: Table 6.10, Part 1 Study

1.13 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The Study provides a broad overview of the potential need for further retail development in the short – medium term up to 2022, with longer term forecast up to 2027 and 2032. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2032 should be treated with caution.

2.0 Part 2 - Methodology

Centre Health Checks

2.1 The NPPG advises that town centre strategies should be based on evidence of the current state of town centres. Strategies should assess the appropriate and realistic role, function and hierarchy of centres, and this will involve auditing existing centres to assess their role, vitality, viability and potential to accommodate new development and different types of development.

2.2 The NPPG identifies indicators that are relevant in assessing the health of town centres can include:

- diversity of uses;
- proportion of vacant street level property;
- customers' views and behaviour;
- retailer representation;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- state of town centre environmental quality.

2.3 The following sections provide a health check for each centre. These health checks form the basis for the recommended strategy for Farnborough, Aldershot and North Camp.

Accommodating Growth

2.4 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

2.5 The National Planning Practice Guidance (NPPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

2.6 The NPPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

2.7 The floorspace projections set out in the Part 1 Report and summarised in Section 1.0 assume that new shopping facilities within Rushmoor can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Rushmoor;
- the likelihood that Rushmoor's existing market share of expenditure will change in the future in the face of increasing competition; and
- the potential impact new development may have on existing centres.

2.8 The NPPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2018 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2027 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

2.9 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

2.10 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Rushmoor Borough during the Plan period (to 2032).

2.11 The following sections assess the scope to accommodate growth within and on the edge of Rushmoor's main centres. The strategy for each centre examines the opportunities for accommodating projected growth and assesses potential to accommodate new floorspace.

2.12 The projections summarised in Section 1 relate to Class A1 retail uses and Class A3 to A5 uses only. Based on the current mix of floorspace within centres in Rushmoor Borough, there should also be scope for around 10% of additional floorspace that can be occupied by Class A1 non-retail services and Class A2 uses. Table 2.1 and 2.2 below summarise the floorspace projections by centre in 2032, using the different population scenarios.

Table 2.1: Floorspace requirements over and above commitments, 2032 (sq.m gross) – ONS Population

Centre	A1 Conv	A1 Comp	Class A3-A5	Service Uses	Total
Farnborough	1,975	10,185	890	1,450	**14,500**
Aldershot	1,053	2,500	1,379	548	**5,480**
North Camp	n/a	251	192	27	**470**

Table 2.2: Floorspace requirements over and above commitments, 2032 (sq.m gross) – SHMA Population

Centre	A1 Conv	A1 Comp	Class A3-A5	Service Uses	Total
Farnborough	2,580	15,612	1,238	2,159	**21,589**
Aldershot	2,860	5,144	2,526	1,170	**11,700**
North Camp	n/a	337	228	63	**628**

2.13 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

2.14 All development should be appropriate in terms of scale and nature to the centre in which it is located.

2.15 The existing stock of premises will have a role to play in accommodating projected growth, after the recession. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2.5% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

2.16 The previous studies prepared for Rushmoor in 2004 and 2010 identified a list of 25 potential development sites (town and edge of centre), of which 10 were in Farnborough, 12 in Aldershot and three in North Camp. The development potential of these sites was assessed and 14 were identified as having 'good' or 'reasonable' potential for retail and/or leisure uses. Some of the sites have been developed since the last study, and are no longer available for redevelopment. Key changes relating to the potential availability of sites for each centre since the 2004 and 2010 studies are summarised in the following sections.

Shopping Frontages and Centre Boundaries

2.17 The strategy for each centre reviews shopping frontage and boundary policy options within Rushmoor and considers appropriate policy approaches and measures to inform future planning for retail and town centre uses in the Borough. It is noted that the Core Strategy was adopted in 2011, and the Development Management policies are in the Rushmoor Local Plan Review, adopted in 2000.

2.18 The emerging Rushmoor Local Plan development plan document (DPD) will provide the overarching spatial strategy for Rushmoor, as well as providing detailed development management policies. The comments in this section are intended for consideration in the emerging Rushmoor Local Plan and other development plan documents.

2.19 In undertaking this review, consideration has been given to definitions of the town centre, primary shopping area and primary and secondary frontages contained in the NPPF.

2.20 Annex 2 of the NPPF provides definitions of these designations, as follows:

Town centre*: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Primary shopping area (PSA)*: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

***Primary and secondary frontages**: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.*

2.21 The NPPF indicates four separate designations within town centres can be considered and each has a different policy objective, as follows:

1. **town centre boundaries** – vitality and viability protection and application of the sequential approach;
2. **primary shopping area** – application of the sequential approach;
3. **primary shopping frontages** – maintaining the predominance of Class A1 retail use; and
4. **secondary shopping frontages** – maintaining the mix of retail/non-retail uses.

2.22 The NPPF suggests that in drawing up development plans, local authorities should, in addition to defining the extent of town centres and primary shopping areas, define primary and secondary frontages within designated centres, and set policies that make clear which uses will be permitted in such locations. The NPPF provides limited guidance on the approach policies should adopt. The NPPF glossary indicates that primary frontages are likely to include a high proportion of retail uses which may include food and drink, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

2.23 The NPPF (paragraph 23) also suggests competitive town centres should be promoted that provide customer choice and a diverse retail offer reflecting the individuality of town centres. This implies the most appropriate approach is likely to vary from centre to centre.

2.24 The NPPF provides limited guidance on how these areas, particularly shopping frontages should be identified. Traditionally key factors that can be adopted to identify the extent of the primary shopping area, and primary and secondary frontages include:

- composition of uses: the proportion of retail uses within the frontage based upon the GOAD surveys of the town centres. Primary shopping frontages would comprise higher proportions of A1 retail uses than secondary shopping frontages;
- prime rental levels: analysis of Zone A rental levels of units within the centres sourced from Valuation Office (VOA) website, with primary shopping frontages expected to achieve higher rental levels than the secondary frontages;
- pedestrian flows: level of pedestrian flows within particular areas/ frontages of the centre identified from visits to the centre, with the highest pedestrian flows in the primary shopping frontage;

- key anchor stores: the presence of key anchor stores such as department stores or food stores can also identify the extent of the Primary Shopping Area and key frontages.

2.25 Saved policies within the adopted Rushmoor Local Plan Review include a number of policies relating to shopping within the town centres. The Local Plan defines shopping cores in each of the three main centres. The town and district centre boundaries cover a much wider area than the shopping core.

2.26 Policy TC1 states that development that maintains and enhances the diversity, vitality and viability of Aldershot and Farnborough town centres and North Camp district centre will be permitted. The policy also states that the Council will seek to protect, and where possible strengthen, the retail function of these centres whilst facilitating or maintaining an appropriate level of diversification.

2.27 Policy TC2 relates to the shopping cores of the centres, and sets criteria for non-retail uses within the shopping core, as follows:

1 proposals should not harm the centre's vitality or viability;

2 in each frontage, the number of non-A1 units should not exceed 30% of units in the frontage in Farnborough and Aldershot, or 40% in North Camp;

3 proposals should not involve the loss of an A1 retail unit frontage on a visually prominent site;

4 proposals should not have a material adverse impact upon the appearance of the premises, and upon the character and amenities of the shopping core; and

5 there should be no material adverse impact upon the amenities of nearby residential uses.

2.28 Residential uses are supported above ground floor in the shopping cores (Policy TC3).

2.29 Within the defined town and district centres and outside the shopping cores, a range of other uses are permitted, including offices, residential, banks and financial services, leisure, community facilities, open space and public transport interchanges (policy TC4) and Class B1(a) business use (policy TC5).

2.30 The Rushmoor Core Strategy (adopted October 2011) sets out the overall spatial strategy for Rushmoor in Policy SS1. The Policy states that Rushmoor’s hierarchy of town centres, district centre and local shopping centres will be maintained and enhanced by encouraging a range of facilities and uses, consistent with the scale and function of the centre. For Farnborough and Aldershot, the policy states that town centre uses should be located within the town centres to support their regeneration, and retail development should be focused within the primary shopping areas, although the Core Strategy does not provide a definition of “primary shopping areas”, this means the “shopping cores” as defined on the Local Plan proposals map are the relevant areas.

2.31 If town centre sites are not suitable, available and viable, the policy requires locations for major retail development to be assessed sequentially in accordance with national policy, and new retail development must protect or enhance the vitality and viability of Farnborough and Aldershot town centres. For North Camp, the policy states that the district centre will be protected and enhanced, supporting local needs.

2.32 Current planning policies clearly seek to direct retail and other key town centre uses to the designated town centres, consistent with the NPPF. The Core Strategy/Local Plan does not define a separate PSA or primary/secondary shopping frontages. The defined shopping cores in the Local Plan appear to have a dual function i.e. as the PSA (Policy SS1) for application of the sequential approach and protected shopping frontages (Policy TC2). However the latter appears to be the primary function of the designated shopping cores.

2.33 The NPPG sets out that emerging development plan policies should continue to include boundaries. A clear definition of each boundaries and policies the designation relates to should be provided, in order to ensure policies are not open to misinterpretation.

2.34 When considering emerging town centre policies and the strategy for each centre, the Council needs to consider the following issues:

1. Is it necessary to designate separate town centre boundaries and primary shopping areas (or core shopping area) in each centre, or will one boundary be sufficient?
2. Is it necessary to define separate primary and secondary shopping frontages or will one frontage be appropriate?
3. Should the designated shopping frontages relate to the same area as the primary shopping area (PSA)?

2.35 The NPPF requires planning policies to be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. This approach includes defining the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and allocating suitable sites for retail and other main town centre uses.

Sequential and Impact Policy Tests

Impact Thresholds

2.36 The NPPG states that if setting a locally appropriate threshold, it is important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;

- likely effects of development on any town centre strategy; and
- the impact on any other planned investment.

2.37 If the NPPF threshold (2,500 sq.m gross) was adopted, then a single development proposal could exceed the entire short term (up to 2022) floorspace projections for the Borough without the need for a retail impact assessment. Furthermore the existing shop vacancy rate is relatively high and the vitality and viability of centres is fragile.

2.38 Cumulative impact is also an issue within the Borough, bearing in mind the significant amount of retail commitments in the pipeline, particularly in Farnborough.

2.39 Proposals that significantly exceed the floorspace projections are likely to significantly reduce the turnover of existing floorspace, and this impact should be carefully tested on a case by case basis.

2.40 The NPPF threshold of 2,500 sq.m gross is considered to be inappropriate as a blanket threshold for Rushmoor Borough, as this scale of development would represent a significant proportion of the overall retail projections in the Borough. Development below 2,500 sq.m gross may also have cumulative impact implications. Development smaller than 2,500 sq.m gross could have a significant adverse impact on smaller centres.

2.41 The need for locally set impact thresholds is assessed for each centre.

The Sequential Approach

2.42 The level of guidance relating to the sequential approach to site selection has reduced within the NPPF. The NPPF gives preference to accessible edge and out-of-centre sites that are well-connected to the town centre; this applies to both plan-making and considering applications.

2.43 As indicated above, in order to apply the sequential approach, it is necessary to define town centre boundaries. The designation of primary shopping areas (PSA) or centre boundaries is important when applying the sequential approach and directing town centre uses to appropriate locations.

2.44 The catchment area of Rushmoor's town and district centres overlap. The area of search that will apply to retail and leisure development needs to be considered.

2.45 A large development that will attract trade from across the Borough should consider sites within all three centres. A smaller scale development with a more localised catchment may only be required to search for sites within the nearest centre. Development plan policies should provide guidance on the area of search for sequential sites.

3.0 Farnborough Town Centre Strategy

Role and Position in the Hierarchy

3.1 Farnborough is identified as a Town Centre in Rushmoor's retail hierarchy. The centre is ranked 265th in the country (source: Javelin's Venuescore), below Guildford (33rd), Basingstoke (53rd) and Camberley (163rd), but above Farnham (271st), Fleet (338th) and Aldershot (343rd). Farnborough lies in the north of the Borough and is a second tier centre. Farnborough centre primarily meets the needs of Farnborough and a small rural catchment area.

3.2 The centre is focused around a purpose built pedestrianised shopping environment, including two indoor shopping centres, Princes Mead and Kingsmead.

3.3 The centre includes:

- convenience shopping – including large Asda and Sainsbury's supermarkets, and an Iceland, supported by bakers, newsagents and off-licences;
- comparison shopping – a range of independent and national multiple retailers, including Debenhams, Wilkinson and a number of independent shops selling a range of mainly lower order comparison goods;
- services – including a range of independent cafes, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment – including several pubs/bars;
- community facilities – including a leisure centre.

Farnborough Health Check

3.4 Farnborough has a total of 160 retail/service units. The diversity of uses present in the centre in terms of the number of units is set out in Table 3.1, compared against the national average.

Table 3.1 Farnborough Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Farnborough %	UK Average (1)
Comparison Retail	67	41.9	36.0
Convenience Retail	10	6.3	8.1
A1 Services (2)	18	11.3	14.1
A2 Services	27	16.9	12.1
A3/A5	17	10.6	14.7
A4 pubs/bar	2	1.3	2.9
Vacant	19	11.9	12.1
Total	**160**	**100.0**	**100.0**

Source: Experian Goad 2014 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

3.5 The majority (56%) of the comparison/convenience retailers are national multiples. The main comparison operators include: Debenhams, M&Co, Argos, Boots, WH Smith, New Look, Wilkinson and Boots. The centre has a good provision of mainstream/middle market multiple retailers.

3.6 The centre's mix of units shows that representation of comparison retailers is above the national average, and the proportion of convenience retailers is below. Although there is a low proportion of convenience retailers, there is a reasonable provision of convenience floorspace due to the two large convenience stores (Sainsbury's and Asda). At 16.9%, the proportion of A2 uses is above the national average of 12.1% and the proportion of A3/A5 is below (10.6% compared to 14.7%).

3.7 Farnborough has a good selection of comparison shops (67). Table 3.2 provides a breakdown of comparison shop units by category.

Table 3.2 Farnborough Breakdown of Comparison Units

Type of Unit	Farnborough		% UK Average*
	Units 2014	%	
Clothing and footwear	17	25.4	25.0
Furniture, carpets and textiles	3	4.5	7.4
Booksellers, arts, crafts and stationers	7	10.4	10.6
Electrical, gas, music and photography	11	16.4	9.4
DIY, hardware and homewares	5	7.5	6.4
China, glass, gifts and fancy goods	2	3.0	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	8	11.9	10.0
Variety, department and catalogue	2	3.0	1.6
Florists, nurserymen and seedsmen	1	1.5	2.3
Toys, hobby, cycle and sport	4	6.0	5.2
Jewellers	3	4.5	5.0
Charity/second-hand	3	4.5	8.4
Other comparison retailers	1	1.5	2.9
Total	**67**	**100.0**	**100.0**

Source: Experian Goad, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

3.8 The centre provides all of the GOAD Plan comparison categories, apart from cars/motorcycles/motor accessories, although the choice in certain categories is low. The centre has an average proportion of clothing/footwear and bookseller/arts/crafts/stationers and a higher proportion of electrical/gas/music/photography and variety/department/catalogue uses.

3.9 Farnborough has a good range of non-retail service uses, with all categories present. Categories are mostly well represented (see Table 3.3) reflecting the size of the centre and its service role within the shopping hierarchy.

3.10 The proportion of restaurants/cafes is significantly below the national average, whereas fast food/takeaways and banks/other financial services are significantly above the national average.

Table 3.3 Farnborough Analysis of Selected Service Uses

Type of Unit	Farnborough		% UK Average*
	Units 2014	%	
Restaurants/cafés	6	10.7	23.3
Fast food/takeaways	11	19.6	15.2
Pubs/bars	2	3.6	7.6
Banks/other financial services	14	25.0	12.9
Betting shops/casinos	2	3.6	4.0
Estate agents/valuers	6	10.7	9.5
Travel agents	2	3.6	2.5
Hairdressers/beauty parlours	12	21.4	22.9
Laundries/dry cleaners	1	1.8	2.2
Sub-Total	**56**	**100.0**	**100.0**
Other A1 Services	3		-
Total	**59**		**-**

Source: Experian Goad, 2014.
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

3.11 There were 19 vacant units within Farnborough at the time of the survey, giving a vacancy rate of 11.9%, which is just below the national average of 12.1%. The number of vacant units has fallen significantly over the last decade, with 60 vacant units recorded in 2004.

3.12 The majority of the vacant units (11 units) are located within the Kingsmead Centre, which is under-going redevelopment. The new cinema should help to reduce vacancies. Vacancies elsewhere within the town centre are relatively low.

Shopper Views

3.13 Respondents to the household survey undertaken by NEMS in September 2014 were asked what would make them shop more often in Farnborough Town Centre.

3.14 Around 55% responded that “nothing” would make them shop more often in Farnborough. The other most popular responses related to the shopping offer, including a better choice of shops in general (16%), better choice of clothing stores (7%), more large shops (5%) and better quality shops (4%). Respondents also suggested an improved shopping environment (5%), cheaper car parking (4%), better maintenance/cleanliness and more car parking (2% each) may influence their decision to shop in Farnborough.

Commercial and Property Indicators

3.15 Units within the town centre are generally modern and in a reasonable condition. The external appearance and shop-fronts of some premises along Queensmead could be improved.

3.16 The Princes Mead shopping centre and new development north of The Mead are modern developments in good condition with well-maintained malls and shop frontages. The Kingsmead shopping centre remains dated but this is being addressed by the proposed redevelopment.

3.17 The quality of the street furniture and paving varies throughout the centre. Along Queensmead the street lighting and furniture is modern. Within the two shopping centres there is some basic street furniture along the malls. Outside the entrance to the Princes Mead shopping centre on the Mead, there are two seating areas.

3.18 Prime Zone A retail rents increased in Farnborough from £592 per sq.m in 2003 to £753 per sq.m in 2007 (Source: Colliers). Rental levels decreased during the recession to below £700 per sq.m.

3.19 More recent information on retail rents is available for Farnborough from the Valuation Office (VOA). Retail Zone A rents vary significantly, as shown below.

1	Princes Mead	£555-£630 psm;
2	Queensmead	£300-£315 psm;
3	Victoria Road	£300 psm;
4	The Mead	£200-£300 psm;
5	Farnborough Road	£200-£210 psm; and
1	Kingsmead	£90-£100 psm.

3.20 Princes Mead shopping centre is the prime pitch with Zone A rental levels around £600 psm. Zone A rental levels are relatively high within the fringes of the centre i.e. Victoria Road and Farnborough Road, probably due to their main road frontage and passing trade. These areas out-perform other parts of the town centre that do not benefit from main road frontages.

3.21 Retail rental levels are generally heathier in Farnborough than in Aldershot.

Accessibility and Movement

Car Parking

3.22 The household survey indicated that 77% of respondents travel by car (drivers and passengers) to do their non-food shopping. Access to convenient car parks is important to the vitality and viability of town centres.

3.23 Excluding permit only and private car parks, there are 12 public car parks within or close to Farnborough town centre providing 1,232 spaces. The main car parks are Pinehurst multi-storey (297 spaces), Queensmead (191 spaces), Westmead House (172 spaces), Farnborough Leisure Centre (129) and PC World (126 spaces). The car parking charges per hour short stay ranges from 50 pence to 60 pence.

3.24 The Asda and The Meads car parks provide significant additional parking for shoppers within walking distance from the town centre. There are also spaces at Solatron Retail Park and B&Q. Farnborough's car parks are distributed around the town centre, with good links into the pedestrianised area.

3.25 The household survey indicated that only a small proportion (1.6%) of households consider that more car parking would make them shop in Farnborough town centre more often, which suggests there are low levels of dissatisfaction with parking provision in Farnborough. Only 4.7% mentioned cheaper or free car parking.

Public Transport

3.26 A number of bus routes serve Farnborough town centre. The main bus stops are located on Kingsmead to the south of Kingsmead shopping centre, and also on Victoria Road. Frequent services include bus numbers 1, 2, 9, 11, 41, 42 and the Yo-Yo route. These routes primarily serve the Farnborough, Aldershot and Blackwater towns.

3.27 The household survey results indicate that only 3.9% of respondents in the Farnborough survey area (zone 1) normally travel by bus to their non-food shopping destination, below the average of 4.8% for all nine study area zones. Based on our experience these figures are relatively low and reflect the high levels of car ownership in the survey area, rather than the inadequacy of bus services.

3.28 Farnborough has two train stations, Farnborough and Farnborough North. Both train stations are located to the north of Farnborough town centre. Farnborough train station is on the London Waterloo to Winchester/ Southampton train line and the London Waterloo to Brookwood/Farnborough/ Fleet/Winchfield and Hook line. Farnborough North is on the First Great Western link from Reading to Gatwick Airport. The trains on this line are less frequent than those from Farnborough station. The line connects Farnborough with Wokingham, North Camp, Guildford, Dorking, Redhill, Reading and Gatwick.

Traffic Congestion and Accessibility

3.29 The main shopping streets of Queensmead and The Mead are pedestrianised. The Princes Mead shopping centre and the Kingsmead Shopping Centre are covered centres. Vehicular traffic is separated away from the shopping area. Traffic volumes are high along Farnborough Road to the east of the centre and at the main roundabouts serving Asda, B&Q and Solartron Road retail park.

Pedestrian Access and Movement

3.30 The main shopping thoroughfare is pedestrianised (The Mead), linking the Princes Mead Shopping Centre and Kingsmead Shopping Centre. The Princes Mead Shopping Centre boasts wide pathways which facilitate pedestrian movement. There is a pay-and-display car-park adjacent to the Princes Mead

Shopping Centre, which is used by Asda Supermarket customers. The Kingsmead Shopping Centre is accessed from the main high street.

3.31 To the South there is also the Queensmead and Pinehurst pay and display car parks. The area around Farnborough Leisure Centre, is poorly paved and lit, and has a low pedestrian flow.

3.32 Pedestrian flow count surveys were undertaken by PMRS (Pedestrian Market Research Services) at 28 points within Farnborough in June 2014.

3.33 The highest weekly pedestrian count (over 72,000) was recorded at the Asda store entrance. The next busiest locations were within and leading to the Princes Mead Shopping Centre (around 55,000 per week). Pedestrian flows were reasonably strong along The Mead and the north end of Queensmead (32,000 to 45,000 per week). These average flow counts are generally higher than those recorded in the busiest areas in Aldershot.

3.34 Flow counts were particularly low at the southern end of Queensmead (7,000 to 14,000 per week) and along Victoria Road (less than 5,000 per week).

3.35 Within the Farnborough survey area (Zone 1) 5.8% of household survey respondents normally walked to undertake non-food shopping, which is similar to the average of 5.4% for all nine survey area zones. This average proportion of respondents who walk to their non-food shopping destination reflects the close proximity of residential areas to the town centre.

Environmental Quality

3.36 The quality of the buildings in Farnborough varies significantly. The northern end of Queensmead has been redeveloped, but the southern end still has relatively unattractive 1960s architecture. Princes Mead and The Mead provide relatively attractive modern shopping environments.

3.37 The northern half of Queensmead, The Mead and the Princes Mead shopping centre provide the main focal points within the town centre. Kingsmead shopping centre is being redeveloped and has a high number of vacant units.

3.38 Queensmead is a wide pedestrianised area. In terms of street furniture and paving, the southern part of Queensmead has been improved.

Farnborough Town Centre's Strengths and Weaknesses

Strengths

1 Farnborough is the main shopping centre in the north of Rushmoor Borough, and is comparable in size compared with Aldershot. The range and choice of shops is reasonable for a town centre of its size. Farnborough has a number of large anchor stores i.e. Debenhams, Sainsbury's and Asda. The range and choice of shopping facilities has improved due to recent development.

2 The centre has a good provision of mainstream/middle market comparison multiples, commensurate with a centre of Farnborough's size. In terms of comparison goods multiple retail representation Farnborough ranks above most of its nearest competitors, i.e. Aldershot, Fleet and Farnham.

3 Farnborough has a good selection of food stores suitable for main and bulk food shopping within the core area, i.e. Asda, Sainsbury and Iceland.

4 There is an extensive provision of retail warehouses selling bulky comparison goods within walking distance of the town centre, at Solartron Retail Park and B&Q.

5 The centre's vacancy rate is slightly lower than the national average, but most of the vacant units are within the Kingsmead shopping centre. The proposed cinema and further improvements should address this concentration of vacant units.

6 Retail rental levels are stronger in Farnborough than in Aldershot and North Camp.

7 The central shopping area is pedestrianized, providing a traffic free shopping environment, although the quality of street furniture could be improved at the southern end of Queensmead.

8 The centre has large public and private pay-and display car parks which are distributed around the centre. These car parks are accessible to the main shopping areas.

9 The centre is well served by public transport links, with the main bus stops located on Kingsmead to the south of the Kingsmead shopping centre.

Weaknesses

1 Farnborough does not offer the same range and choice of facilities available within larger competing centres, such as Camberley and Guildford. The town falls within the catchment areas of these centres and many residents in Farnborough choose to do their comparison shopping outside the Borough.

2 The concentration of vacant units at the Eastmead entrance to the Kingsmead shopping centre and the boarded up undeveloped area adjacent to Debenhams gives parts of the town centre a rundown image. Hopefully this is a short term issue prior to the completion of the proposed redevelopment.

3 To the west of the town centre there is congestion at peak times, observed at the roundabout near Asda, B&Q and Solartron Retail Park.

4 The centre has a poorly developed evening economy with a relatively low proportion of restaurants, cafés and bars. The proposed cinema and other improvements within the Kingsmead shopping centre should address this deficiency.

Farnborough Strategy

3.39 The definition of Farnborough as a town centre is consistent with the NPPF. Farnborough falls below larger regional and sub-regional centres, such as Guildford and Basingstoke. The strategy for Farnborough should seek to consolidate the town centre's role within the wider shopping hierarchy. Farnborough should be the main focus for large-scale retail and leisure development (for example over 250 sq.m gross) in the north of the Borough.

3.40 Growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within Farnborough town centre. Farnborough should seek to compete more effectively with other competing towns, particularly Camberley and Fleet.

3.41 As indicated in Section 2, the projection for Class A1 to A5 floorspace within Farnborough could range from 14,500 to 21,600 sq.m gross (depending on the population growth scenario).

3.42 Vacant premises should help to accommodate future growth in Farnborough. As a target, the current vacancy level in Farnborough could fall to 8%, i.e. around the pre-recession national average. If this reduction in vacancy rate is achieved then six reoccupied units in Farnborough could accommodate about 1,200 sq.m gross (840 sq.m net) of Class A1 to A5 floorspace.

3.43 If this reduction in vacant units is achieved, then the overall Class A1 to A5 floorspace projection up to 2032 would reduce from 14,500 sq.m gross to 13,300 sq.m gross, using the ONS population projections. Adopting the SHMA population projections the floorspace projection for 2032 would reduce from 21,600 sq.m gross to 20,400 sq.m gross.

3.44 An analysis of development sites in Farnborough is shown in Appendix 1. Some of the sites have been redeveloped or are existing planning commitments, which have already been taken into account within the retail capacity projections.

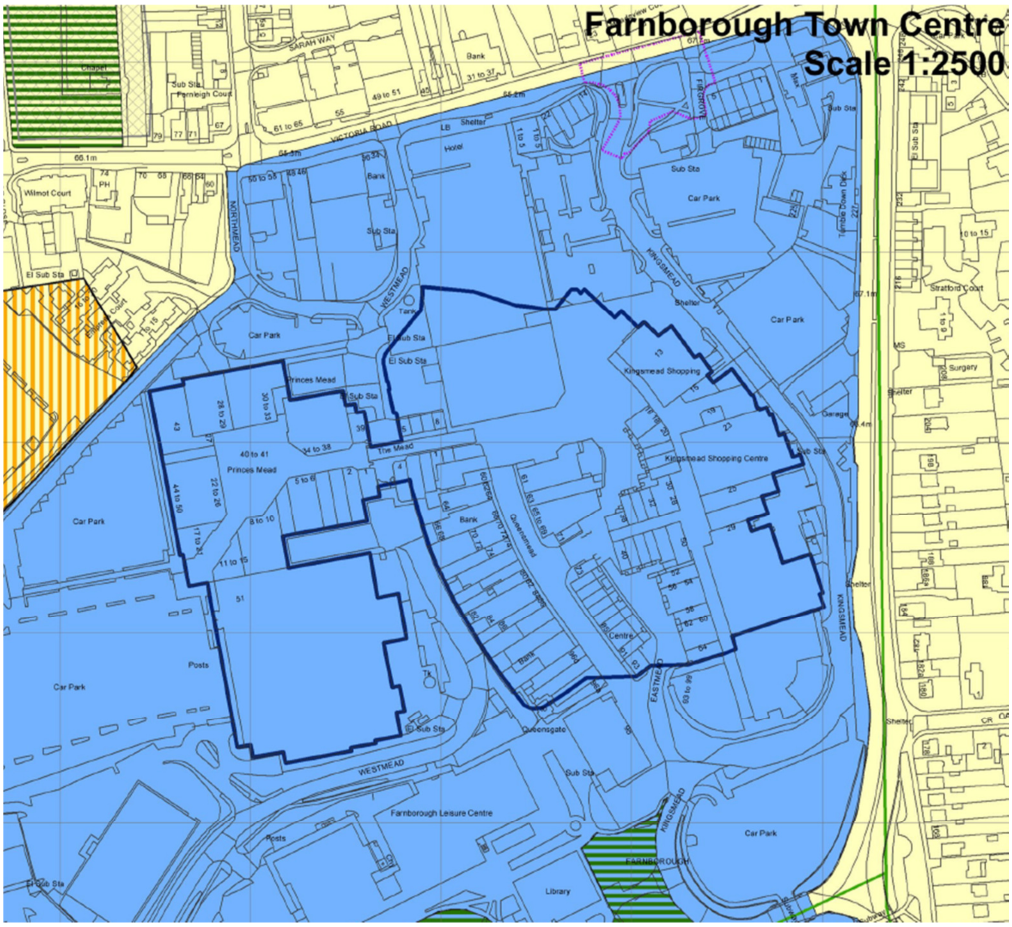
3.45 Of the remaining un-committed sites, two sites have "good" development prospects - Sites F1 (Princes Mead Car Park) and F5 (Car Park off Kingsmead). These two sites could accommodate about 10,000 sq.m gross of Class A1 to A5 floorspace. A further four sites are identified as having reasonable development prospects and these could accommodate over 8,000 sq.m gross of Class A1 to A5 floorspace.

3.46 These six sites, together with the potential reoccupation of vacant floorspace (1,200 sq.m gross), could accommodate all of the floorspace requirements for Farnborough over the period to 2032, adopting the ONS population forecasts (14,500 sq.m gross, Table 2.1 above). Adopting the SHMA population forecasts, there would be a small emerging requirement for an additional 2,400 sq.m gross of Class A1 to A5 floorspace over the period to 2032.

Town Centre Boundary and Primary Shopping Area

3.47 The shopping core (or primary shopping area as described within the NPPF) of Farnborough as defined in the Rushmoor Local Plan Review (dark blue line on Figure 3.1 below) includes Princes Mead (incl. Asda, The Meads), Kingsmead and Queensmead (33-93, 30-96 incl.).

Figure 3.1: Farnborough Shopping Core - Extract from Rushmoor Proposals Map, October 2011



3.48 Emerging plan policies should continue to define a separate Primary Shopping Areas (PSA) and Town Centre Boundary, because the centre has concentrations of other town centre uses beyond the shopping core/PSA. A separate PSA is necessary for applying the sequential approach for retail uses.

3.49 The distinction between the PSA and the Town Centre boundary will provide guidance on the appropriate location for different town centre uses, i.e. retail uses should first be directed to the PSA, while other town centre uses such as offices, hotels and leisure can be located within the wider town centre area i.e. the area between the PSA and the town centre boundary.

3.50 The Town Centre boundary (as currently drawn) includes all areas occupied by main town centre uses. This approach is consistent with the NPPF and no changes to the Town Centre boundary in Farnborough are necessary. The extent of the PSA needs to be considered, and some amendments may be appropriate. For the purposes of the sequential approach, the PSA could be extended to encourage investment within areas that are well connected, contiguous and predominantly occupied by retail uses, as follows:

1 the area immediately to the north of the shopping core to include the new Sainsbury's store, Queensmead;

2 the Iceland store at the southern end of Kingsmead; and

3 the ground floor retail at Briarcliff House southern end of Kingsmead.

3.51 These three additional areas could be included within an expanded PSA as shown in Figure 3.2. Parts of the Princes Mead car park also could be included within the PSA. There are proposals to provide new retail units on the surface car park adjacent to the Princes Mead shopping centre.

Figure 3.2: Suggested Shopping Core (PSA) Expansion Areas in Farnborough

Primary and Secondary Shopping Frontages

3.52 The Rushmoor Core Strategy does not distinguish between primary and secondary frontages in Farnborough, but the saved policies in the Local Plan Review seek to maintain uses within the designated shopping cores. Policy TC2 of the Local Plan Review requires that within each of the frontages within the core shopping areas, the number of non-A1 units does not exceed 30% in Farnborough.

3.53 The capacity projections within the Part 1 Development Needs Study indicate there is a need to retain Class A1 to A5 uses within Farnborough in order to meet the growing needs of the community.

3.54 Current plan policies seek to retain Class A1 retail uses within certain shopping frontages. These policies adopt the designated shopping core (see Figure 3.1 above). The majority of retail units in Farnborough town centre are within the shopping core, but there appears to be considerable potential for changes of use from Use Class A1, because the current proportion of non-class A1 uses in most frontages is low compared with the maximum policy threshold (30%). The Council should consider designating separate primary and secondary frontages with new maximum thresholds for non-class A1 use.

3.55 The main focus for Class A1 uses, larger shop units and multiple retailers is within Princes Mead shopping centre, The Meads and the northern end of Queensmead (62-68 and 61-69). These areas should be designated as primary frontages, where a relatively low maximum threshold for non-class A1 use should apply.

3.56 The proportions of non-class A1 uses in each area of the shopping cores (as currently drawn) are as follows:

Farnborough	Class A1	Non-A1	Total Units	% Non-A1
Princes Mead	31	5	36	13.9
Kingsmead	27	6	33	18.2
33-93, 30-96 Queensmead	26	9	35	25.7

3.57 The 30% maximum threshold has not been breached in Farnborough, but Queensmead is close to reaching the threshold.

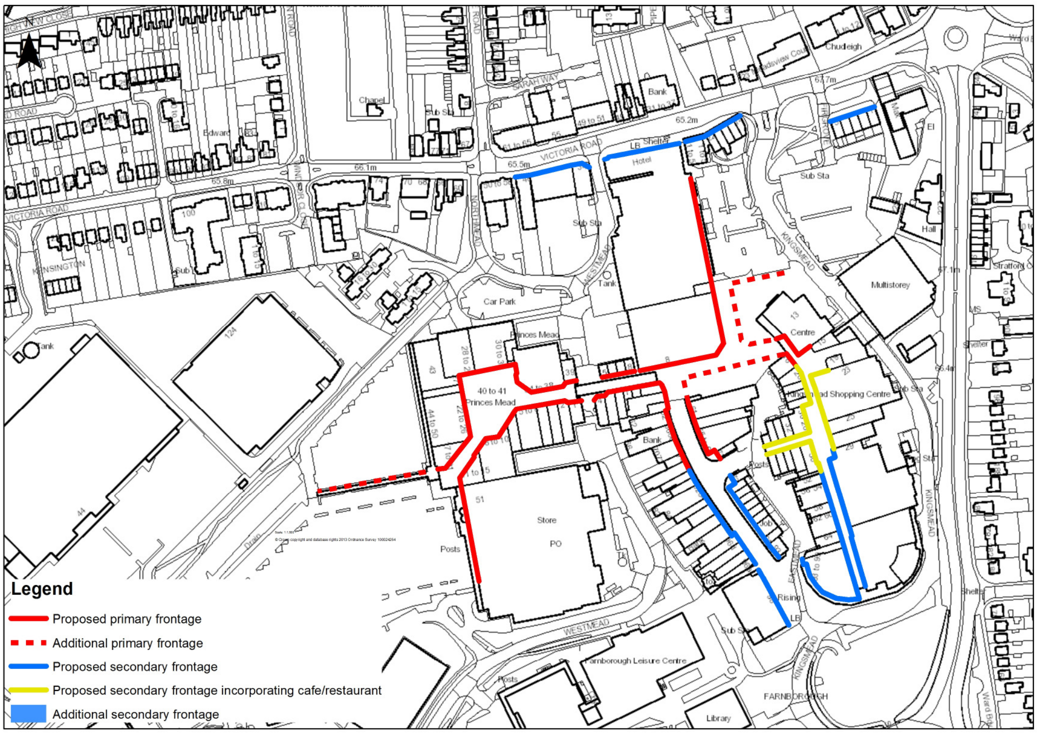
3.58 The Council should also consider identifying specialist quarters or areas where non-retail uses will be focused, for example clusters of cafés, restaurants and bars will improve the evening economy including family orientated entertainment. A strong food and beverage offer will help to maximise the benefits the new cinema will bring.

3.59 There is a concentration of vacant shop premises within close proximity to the proposed new cinema. These shopping frontages could be allocated as secondary shopping frontages where food and beverage uses could be specifically encouraged. The remainder of Kingsmead could be allocated as secondary shopping frontage.

3.60 In other parts of the centre e.g. the remaining units on Queensmead plus the units at ground floor level of Briarcliff House, the vacancy rate is relatively low but the proportion of Class A1 uses is much lower. These areas could be designated as secondary frontage and the maximum threshold for non-retail uses could be much higher.

3.61 The potential extent of primary (red lines) and secondary (blue and yellow lines) frontages is shown on Figure 3.3 below.

Figure 3.3: Suggested Shopping Frontages in Farnborough



3.62 Primary shopping frontages should seek to maintain the focus of Class A1 uses. Based on the current mix of Class A1 and non-A1 uses within these frontages, the maximum threshold for non-A1 use could be reduced from 30% to 20%. Within secondary frontages more flexibility and diversity can be promoted, and a maximum threshold of 50% for non-A1 uses could be adopted.

3.63 If the suggested proposed extensions to the PSA are incorporated, then the Sainsbury's frontage should be included within primary shopping frontages, and the ground floor of Briarcliffe House should be secondary shopping frontage.

3.64 Subject to the implementation of retail units on the Princes Mead car park, a new primary frontage could be proposed (dotted red line).

Impact and Sequential Tests

3.65 Development that serves a relatively wide catchment area, perhaps Rushmoor Borough as whole, should be concentrated in Farnborough and Aldershot town centres. Development of more than local significance (over 250 sq.m gross) within the north of the Borough should consider sequential sites within and on the edge of Farnborough town centre.

3.66 Retail development over 1,000 sq.m gross and located outside the Farnborough and Aldershot PSAs should be required to prepare a retail impact assessment. A reduced locally set threshold of 1,000 sq.m gross is appropriate based on the retail floorspace projections.

3.67 Leisure and other main town centre uses over 1,000 sq.m gross and located outside the Farnborough and Aldershot Town Centre boundaries should be required to prepare an impact assessment.

4.0 # Aldershot Town Centre Strategy

Role and Position in the Hierarchy

4.1 Aldershot is a designated Town Centre in Rushmoor's retail hierarchy, and is the largest retail centre in the Borough, in terms of number of retail units. It is located in the south of the Borough of Rushmoor. The centre is ranked 343rd in the country (source: Javelin's Venuescore), below Guildford (33rd), Basingstoke (53rd), Camberley (163rd), Farnborough (265th), Farnham (271st) and Fleet (338th), but above Wokingham (360th) and Alton (532nd).

4.2 The town centre is focused around the pedestrianised Union Street and Wellington Street, with The Wellington Centre in the middle. Architecturally, Aldershot is a mix of Victorian and modern and benefits from a number of sites with development potential. The centre includes:

- convenience shopping – including a Morrisons supermarket, an Iceland, Lidl and Co-operative Food Store, supported by bakers, newsagents and off-licences;
- comparison shopping – a range of independent and national multiple retailers, including Marks & Spencer and a high proportion of independent shops selling a range of lower order comparison goods;
- services – including a good range of independent cafes, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment – including pubs/bars, a cinema, a bingo hall and a theatre;
- community facilities – including a library and places of worship.

Aldershot Health Check

4.3 Aldershot Town Centre has a total of 305 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table 4.1, compared against the national average.

Table 4.1 Aldershot Town Centre Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Aldershot %	UK Average (1)
Comparison Retail	84	27.5	36.0
Convenience Retail	22	7.2	8.1
A1 Services (2)	39	12.8	14.1
A2 Services	34	11.1	12.1
A3/A5	46	15.1	14.7
A4 pubs/bar	8	2.6	2.9
Vacant	72	23.6	12.1
Total	**305**	**100.0**	**100.0**

Source: Experian Goad 2014 and NLP 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

4.4 The centre's mix of units differs from the national average, most notably with regard to the proportion of comparison retail uses and vacant units. Comparison retail is significantly under represented, with a difference of 8.5 percentage points compared with the national average. The vacancy rate of the centre is almost double the national average at 23.6%, suggesting there is weak demand for units in the centre. The reason for such a high proportion of vacant units is partly attributed to the entirely vacant Galleries Shopping Centre.

4.5 Only 39% of the comparison/convenience retailers are national multiples, which is much lower than Farnborough (56%). The main comparison operators include: Marks & Spencer Outlet, Argos, Boots, WH Smith, New Look and Boots. The centre has a reasonable provision of mainstream multiple retailers.

4.6 Aldershot has a good selection of comparison shops (84). Table 4.2 provides a breakdown of comparison shop units by category. The centre does not provide any shops within the 'cars, motorcycles and motor accessories' category. The choice of toys/sport/hobby and jewellers is very good. The proportion of clothing/footwear, booksellers/arts/crafts/stationers and chemist/drugstore/ opticians is below the national average.

Table 4.2 Aldershot Breakdown of Comparison Units

Type of Unit	Aldershot		% UK Average*
	Units 2014	%	
Clothing and footwear	20	23.8	25.0
Furniture, carpets and textiles	5	6.0	7.4
Booksellers, arts, crafts and stationers	4	4.8	10.6
Electrical, gas, music and photography	10	11.9	9.4
DIY, hardware and homewares	6	7.1	6.4
China, glass, gifts and fancy goods	3	3.6	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	6	7.1	10.0
Variety, department and catalogue	2	2.4	1.6
Florists, nurserymen and seedsmen	1	1.2	2.3
Toys, hobby, cycle and sport	9	10.7	5.2
Jewellers	10	11.9	5.0
Charity/second-hand	6	7.1	8.4
Other comparison retailers	2	2.4	2.9
Total	**84**	**100.0**	**100.0**

Source: Experian Goad, 2014 *UK average for all town centres surveyed by Goad Plans (March 2014)

4.7 Aldershot has a reasonable range of service uses reflecting the size of the centre and its service role in the shopping hierarchy, as shown in Table 4.3.

4.8 The proportion of restaurants and cafes is below the national average, but the proportion of hot food takeaways is significantly higher. The proportion of betting shops is slightly above the national average. There is also a higher proportion of estate agents/valuers.

Table 4.3 Aldershot Analysis of Selected Service Uses

Type of Unit	Aldershot		% UK Average*
	Units 2014	%	
Restaurants/cafés	21	17.2	23.3
Fast food/takeaways	25	20.5	15.2
Pubs/bars	8	6.6	7.6
Banks/other financial services	13	10.7	12.9
Betting shops/casinos	6	4.9	4.0
Estate agents/valuers	15	12.3	9.5
Travel agents	5	4.1	2.5
Hairdressers/beauty parlours	26	21.3	22.9
Laundries/dry cleaners	3	2.5	2.2
Total	**122**	**100.0**	**100.0**
Other A1 Retail Services	5	-	-
Total	**127**	**-**	**-**

Source: Experian Goad, 2014. *UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

4.9 There are 72 vacant retail units within Aldershot Town Centre, with a vacancy rate of 23.6%, almost double the national average of 12.1%. The number of vacant units has increased significantly since 2003 (up from 35 vacant units).

4.10 The vacant units are concentrated in three clusters: The Galleries shopping centre; The Arcade; and at the junction of Union Street, Wellington Street and High Street.

Shopper Views

4.11 Respondents to the household survey undertaken by NEMS in September 2014 were asked what, if anything, would make them shop more often in Aldershot Town Centre.

4.12 Around 35% responded that “nothing” would make them shop more often in Aldershot. The other most popular responses related to the shopping offer, including a better choice of shops in general (32%), better choice of clothing stores (9%), better quality shops and more large shops (7% each) and more food supermarkets (3%). Respondents also referred to the overall shopping environment of the town centre, including improved shopping environment (8%), better maintenance/cleanliness (5%), update/refurbish the town centre and less empty shops (3% each). More car parking and cheaper car parking were each also referred to by 2% of respondents.

Commercial and Property Indicators

4.13 Shop units within the town centre are in a reasonable condition, especially within the Wellington shopping centre. There are some poor quality units in need of refurbishment in other parts of the centre e.g. in Wellington Street. The quality of the street furniture and paving is reasonably well maintained, especially on Union Street and Upper Union Street. Victoria Road has narrower pavements and limited street furniture provision.

4.14 Prime Zone A retail rents increased in Aldershot from £484 per sq.m in 2003 to £646 per sq.m in 2007 (Source: Colliers). Rental levels decreased during the recession to below £500 per sq.m. More recent Information on retail rents is available for Aldershot from the Valuation Office (VOA). Retail Zone A rents vary significantly, as shown below.

1 Union Street £175-£367 psm (higher levels at the east end);
2 Wellington Centre £215-£310 psm;
3 Wellington Street £185-£250 psm;
4 Victoria Road £130-£263 psm (higher levels in middle section);
5 Station Road £175 psm; and
6 High Street £125-£142 psm;
7 The Galleries £60-£75 psm.

4.15 Zone A rental levels within the prime pitch are generally between £250 to £350 per sq.m. The low rental levels within the Galleries may be a reflection of the high vacancy rate.

4.16 Retail rental levels are generally weaker in Aldershot than in Farnborough.

Accessibility and Movement

Car Parking

4.17 The household survey indicated that 77% of respondents travel by car (drivers and passengers) to do their non-food shopping. Access to convenient car parks is important to the vitality and viability of town centres.

4.18 Excluding permit only car parks, there are 6 public car parks within or close to Aldershot town centre providing 1,016 spaces. The main car parks are High Street multi-storey (624 spaces), Parsons Barracks (167 spaces), Birchett Road (76 spaces), Princes Gardens (71 spaces) and Co-op (71 spaces). The car parking charges per hour short stay ranges from 50 pence to 80 pence.

4.19 The Tesco and Morrisons food store car parks also provide additional parking for shoppers within walking distance from the town centre.

4.20 The household survey indicated that only a small proportion (2.2%) of households consider that more car parking would make them shop in Aldershot town centre more often, which suggests there are low levels of dissatisfaction with parking provision in Aldershot. Only 2.7% mentioned cheaper or free car parking.

Public Transport

4.21 Aldershot has fewer bus routes than Farnborough town centre. The main bus stops are located on the High Street and also on Victoria Road. Frequent services include bus numbers 1, 3, 72 and 442. These routes primarily serve the Aldershot and Farnborough areas.

4.22 The household survey results indicate that 9% of respondents in the Aldershot survey area (zone 2) normally travel to by bus to their non-food shopping destination, significantly above the average of 4.8% for all nine study area zones. These figures suggest bus services are important to Aldershot's vitality and viability.

4.23 The train station at Aldershot is on the South West train line from London Waterloo to Alton/Aldershot. The train line connects Aldershot with Farnham, Ascot, Guildford, Byfleet, Walton on Thames, Woking and Clapham Junction. At peak times trains run approximately every half an hour.

Traffic Congestion and Accessibility

4.24 A significant proportion of Aldershot centre is pedestrianised and traffic congestion is not an issue. Elsewhere in the town centre, along the High Street and Victoria Road some pavements are narrow which can get congested. However, Union Street has wide spacious pavements. Based on NLP's observations, there is a steady flow of traffic on the roads surrounding the centre, although no major congestion has been observed. The heaviest flow of traffic appears to be on Victoria Road, which can make it difficult for pedestrians to cross the road.

Pedestrian Access and Movement

4.25 The main shopping thoroughfare is along the Union Street and through the Wellington Shopping Centre. This area includes a reasonable range of national retailers including Marks & Spencer, WH Smith and Boots. The main shopping area provides a natural circuit for pedestrians, along Union Street, through the Wellington Shopping Centre and The Galleries, on to Victoria Road and then back along Wellington Street to Union Street. Pedestrian movement between the Wellington Shopping Centre and through The Galleries is hindered by changes in level, which may explain the high levels of vacant units and low rental values within the latter. The upper end of Union Street and the High Street are not in the natural loop and this area has less pedestrian movement.

4.26 Pedestrian flow count surveys were undertaken by PMRS (Pedestrian Market Research Services) at 30 points within Aldershot Farnborough in June 2014.

4.27 The highest weekly pedestrian count (about 49,000) was recorded in Union Street near the J D Sport outlet. The next busiest locations were also within Union Street (east) and within the Wellington Centre (33,000 to 45,000 per week). Pedestrian flows were reasonably strong throughout the Wellington Centre and along Wellington Street (22,000 to 28,000 per week). These average flow counts are generally lower than those recorded in the busiest areas in Farnborough.

4.28 Flow counts were particularly low within Station Road (3,000 to 8,000 per week) and along the High Street (also 3,000 to 8,000 per week).

Environmental Quality

4.29 The quality of the buildings in Aldershot town centre is generally good. Both Wellington Street and Union Street are pedestrianised zones and paving is of a reasonable standard with some street furniture. The centre is well sign-posted throughout.

4.30 The units are 1930/40s style with some 1960s infill, with the addition of the Wellington Centre in the 1980s. The Wellington Centre is a well maintained covered shopping mall with good quality flooring and lighting. The Arcade is a small covered shopping parade, providing good lighting and a clean environment. The Victoria Road area has narrow pavements with some street furniture and reasonable lighting. The Galleries covered shopping mall is modern but predominantly vacant.

Aldershot Town Centre's Strengths and Weaknesses

Strengths

1. Aldershot is of comparable size with Farnborough, and these two are the largest shopping centres in the Rushmoor Borough. The town centre provides a reasonable range and choice of facilities for residents in the south of the Borough.
2. The centre has reasonable provision of street furniture and landscaping.
3. There is good signage throughout the centre for pedestrians and motorists. The structure of the centre provides a convenient natural circuit for pedestrians.
4. The town centre also provides a range of service facilities including banks and building societies, restaurants and bars.
5. The centre's layout is legible and the main shopping streets are pedestrianised or have wide pavements. The secondary streets have low levels of traffic and numerous pedestrian crossings, promoting pedestrian movement.
6. The centre is served by a number of bus routes and is in close proximity to Aldershot Railway Station.
7. There are a number of large, multi-storey car parks within close proximity to the primary shopping streets.
8. The town centre has a good mix of shopping areas including covered modern centres, pedestrianised streets and secondary areas with independent traders.

Weaknesses

1 Aldershot does not offer the same range and choice of facilities available within larger competing centres, e.g. Guildford and Basingstoke. In terms of comparison goods multiple retail representation, Aldershot ranks below its nearest competitors, i.e. Farnborough, Fleet and Farnham. The proportion of comparison retail is significantly below the national average.

2 The town centre does not have a major department store, but Marks & Spencer and Morrisons are important anchor stores.

3 The vacancy rate is significantly higher than the national average, which suggests demand for premises is weak and/or supply outstrips demand. Alternative non-retail uses or downscaling of retail floorspace may be required where vacant units are concentrated i.e. the Galleries shopping centre, The Arcade and at the junction of Union Street, Wellington Street and High Street.

4 The links between the Wellington shopping centre and The Galleries are poor with changes of level. The physical structure of the Galleries is dis-functional. The high level of vacancy suggests major redevelopment is required.

5 Retail rental levels are weaker in Aldershot than in Farnborough, despite their similarities in terms of size and position in the hierarchy.

6 Within the centre there are some unattractive 1960s buildings that detract from the overall attractiveness of the centre. Some older premises are in poor condition and are in need of refurbishment.

7 Aldershot Railway Station is not well connected to the main retail area. Better legibility between Station Road and Victoria Road would benefit the centre as a whole.

8 Some secondary street shop-fronts are run down and could benefit from some investment to enhance the environmental quality.

Aldershot Strategy

4.31 The definition of Aldershot as a town centre is consistent with the NPPF. Aldershot falls below larger regional and sub-regional centres. The strategy for Aldershot should seek to consolidate the town centre’s role within the wider shopping hierarchy. Aldershot should be the main focus for large-scale retail and leisure development (for example over 250 sq.m gross) in the south of the Borough.

4.32 Growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within Aldershot town centre. Aldershot should seek to compete more effectively with other competing towns, particularly Farnborough, Fleet and Farnham.

4.33 As indicated in Section 2, the projection for Class A1 to A5 floorspace within Aldershot could range from 5,500 to 11,700 sq.m gross (depending on the population growth scenario).

4.34 Aldershot has a high shop vacancy rate (23.6%) with around 12,800 sq.m gross of vacant floorspace. Vacant floorspace exceeds the floorspace capacity projections and in theory vacant premises could accommodate future growth in Aldershot. However more than half of the vacant units and two thirds of the vacant floorspace is located within The Galleries Shopping centre and The Arcade.

4.35 The unit vacancy rate excluding these two locations is comparable with the national average (12%). Redevelopment of The Galleries rather than the reoccupation of vacant space should be the priority. This redevelopment may result in a reduction in the amount of Class A floorspace, rather than re-occupation of all vacant space.

4.36 Many of the other existing vacant units are generally small or in secondary locations. These units may not be attractive to retailers seeking modern units. It may be more likely that the vacant units would be reoccupied for non-A1 retail uses, and the Council should take a flexible approach to application for the change of use of vacant retail units in secondary areas where this could improve activity and investment in the town centres.

4.37 An analysis of development sites in Aldershot is shown in Appendix 2. Some of the sites have been redeveloped partially or fully. Of the remaining sites five sites have been identified as having ‘good’ development potential in Aldershot. The most significant opportunity is the potential redevelopment of The Galleries shopping centre, which is currently vacant. The amount of Class A floorspace within this area is likely to reduce, but there should be potential to provide up to 5,000 sq.m gross at ground floor. The redevelopment of The Galleries shopping centre and the reuse of The Arcade should be the priorities within Aldershot.

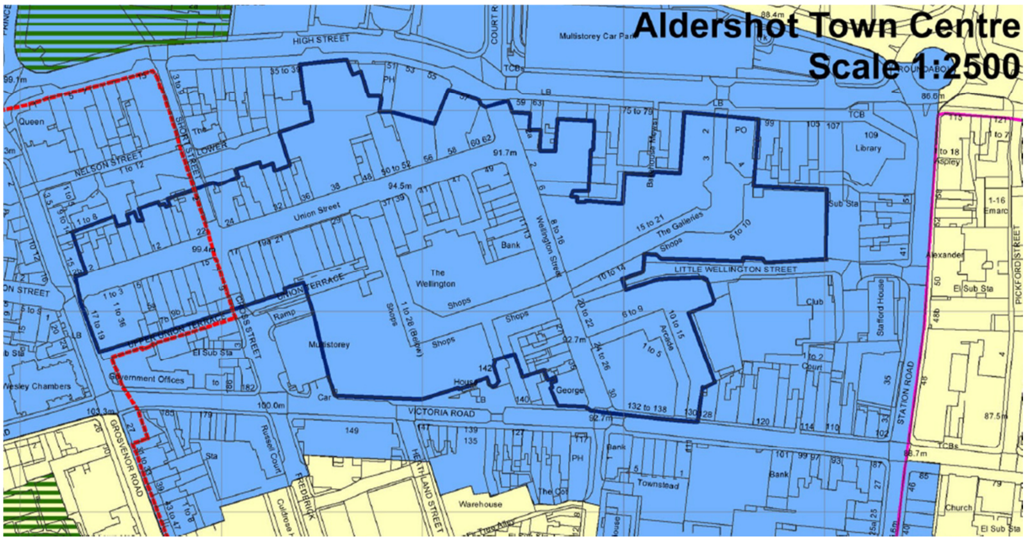
4.38 Other development opportunities with either ‘good’ or ‘reasonable’ prospects in Aldershot town centre could accommodate over 16,000 sq.m gross of retail and leisure floorspace. Some of these sites are longer term options that may not come forward within the Plan period. The development potential is more than the identified floorspace requirements for Aldershot, based on both the ONS and SHMA population projections. It may be appropriate to direct additional floorspace towards Aldershot to help address the needs that will arise from the new residents of the Aldershot Urban Extension.

Town Centre Boundary and Primary Shopping Area

4.39 The shopping core of Aldershot is defined (dark blue line on Figure 4.1) in the Rushmoor Local Plan Review as Wellington Street (1-37, 2A-30 incl.), The Arcade, Wellington Centre Phases I and II and Union Street (1-49, 2-62 incl.).

4.40 The emerging policies should continue to define a separate Primary Shopping Areas (PSA) and Town Centre Boundary for Aldershot, because the centre has concentrations of other main town centre uses beyond the shopping core/PSA. A separate PSA is necessary for applying the sequential approach for retail uses.

Figure 4.1: Aldershot Shopping Core - Extract from Rushmoor Proposals Map, October 2011



4.41 The distinction between the PSA and the Town Centre boundary will provide guidance on the appropriate location for different town centre uses, i.e. retail uses should first be directed to the PSA, while other town centre uses such as offices, hotels and leisure can be located within the wider town centre area i.e. the area between the PSA and the town centre boundary. However the extent of the PSA needs to be considered, and some amendments to the extent of the PSA may be appropriate.

4.42 If the Council chooses to define a PSA then the emerging development plan should include all parts of the core shopping area shown above, but the PSA could be extended to include the following areas that are well connected, contiguous and predominantly retail:

1 the area to the north of the shopping core, between High Street and Union Street, from Princes Way along to Marks & Spencer; and

2 the area to the west of the shopping core bounded by Grosvenor Road, Upper Union Street and Barrack Road.

4.43 These two areas could be included within an expanded PSA as shown in Figure 4.2. These areas are well connected and are predominantly in retail uses.

Figure 4.2: Suggested Shopping Core (PSA) Expansion Areas in Aldershot

Primary and Secondary Shopping Frontages

4.44 The Rushmoor Core Strategy does not distinguish between primary and secondary frontages in Aldershot, but the saved policies in the Local Plan Review seek to maintain uses within the designated shopping cores. Policy TC2 of the Local Plan Review requires that within each of the frontages within the core shopping areas, the number of non-A1 units does not exceed 30% in Aldershot.

4.45 The capacity projections within the Part 1 Development Needs Study indicate there is a need to retain Class A1 to A5 uses within Aldershot in order to meet the growing needs of the community.

4.46 Current plan policies seek to retain Class A1 retail uses within certain shopping frontages. These policies adopt the designated shopping core (see Figure 4.1 above). The proportions of non-Class A1 uses in each area within Aldershot (as currently drawn) are as follows:

Aldershot	Class A1	Non-A1	Total Units	% Non-A1
1-37, 2-30 Wellington Street	11	8	19	42.1
Union Street	35	12	47	25.5
Wellington Centre	35	3	38	7.9
The Arcade	15	4	19	21.1

4.47 The 30% maximum threshold has been breached in the Wellington Street as a whole. The southern end of Wellington Street and the Arcade has a high concentration of vacant units. This area could be designated as secondary frontage where a more flexible approach to non-Class A1 units could be adopted.

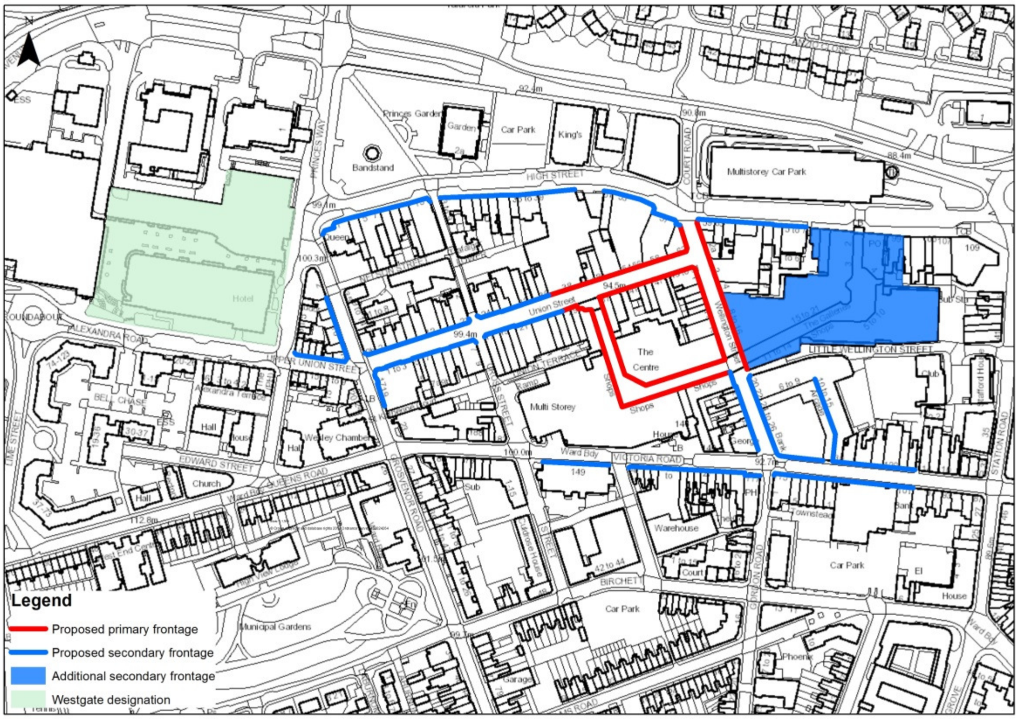
4.48 The main shopping circuit is through the Wellington Centre, Union Street (east side) and the north part of Wellington Street. This area has a predominance of Class A1 use, and should be designated as primary shopping frontages.

4.49 The west half of Union Street has a number of non-Class A1 uses and could be designated as secondary frontages.

4.50 The Council should also consider identifying a specialist restaurant quarter within the Westgate cinema development to maintain and enhance the evening economy including family orientated entertainment (shaded green below). A strong food and beverage offer will help to maximise the benefits the new cinema will bring.

4.51 The potential extent of primary (red lines) and secondary (blue lines) frontages is shown on Figure 4.3 below.

Figure 4.3: Suggested Shopping Frontages in Aldershot



4.52 Primary shopping frontages should seek to maintain the focus of Class A1 uses. Based on the current mix of Class A1 and non-A1 uses within these frontages, the maximum threshold for non-A1 use could be reduced from 30% to 20%. Within secondary frontages more flexibility and diversity can be promoted, and a maximum threshold of 50% for non-A1 uses could be adopted.

4.53 Subject to the redevelopment of the Galleries Shopping Centre, a new secondary frontage could be proposed (shaded blue).

Impact and Sequential Tests

4.54 Development of more than local significance (over 250 sq.m gross) within the south of the Borough should consider sequential sites within and on the edge of Aldershot town centre.

4.55 Retail development over 1,000 sq.m gross and located outside the Farnborough and Aldershot PSAs should be required to prepare a retail impact assessment. A reduced locally set threshold of 1,000 sq.m gross is appropriate based on the retail floorspace projections.

4.56 Leisure and other main town centre uses over 1,000 sq.m gross and located outside the Farnborough and Aldershot Town Centre boundaries should be required to prepare an impact assessment.

5.0 North Camp District Centre

Role and Position in the Hierarchy

5.1 North Camp is designated as a District Centre by Rushmoor Borough Council. It serves the needs of residents of North Camp in south Farnborough, providing a range of small shops and services for local needs. The centre is located in the middle of the Borough and is focused around Camp Road and Lynchford Road. The centre includes:

- convenience shopping – including a Co-operative supermarket supported by bakers, newsagents and off-licences;
- comparison shopping – a range of comparison shops, mainly independent stores with few national multiple retailers.
- services – including a good range of independent cafes, restaurants, takeaways and hairdressers/beauty parlours;
- entertainment – including several pubs/bars;
- community facilities – including places of worship and a community hall.

North Camp Heath Check

5.2 North Camp has a total of 124 retail/service units. The diversity of uses present in the centre in terms of the number of units is set out in Table 5.1, compared against the national average.

Table 5.1 North Camp Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		North Camp %	UK Average (1)
Comparison Retail	42	33.9	36.0
Convenience Retail	12	9.7	8.1
A1 Services (2)	18	14.5	14.1
A2 Services	9	7.3	12.1
A3/A5	25	20.2	14.7
A4 pubs/bar	3	2.4	2.9
Vacant	15	12.1	12.1
Total	**124**	**100.0**	**100.0**

Source: Experian Goad 2014 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (2014).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

5.3 The centre's mix of units shows that representation of comparison retailers is slightly below the national average, and the proportion of convenience retailers is above. Due to North Camp serving a local population this is in line with what we would expect.

5.4 The proportion of A3/A5 uses is significantly higher than the national average, and the proportion of A2 is below. All other uses are roughly in line with the national average and the vacancy rate is exactly the same as the national average.

5.5 Most of the retail outlets within North Camp are small independent traders. Co-op, Boots, Premier and charity shops are the only multiples. North Camp has a good selection of comparison shops (42). Table 5.2 provides a breakdown of comparison shop units by category.

Table 5.2 North Camp Breakdown of Comparison Units

Type of Unit	North Camp		% UK Average*
	Units 2014	%	
Clothing and footwear	5	11.9	25.0
Furniture, carpets and textiles	8	19.0	7.4
Booksellers, arts, crafts and stationers	3	7.1	10.6
Electrical, gas, music and photography	2	4.8	9.4
DIY, hardware and homewares	5	11.9	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor accessories	2	4.8	1.3
Chemists, drug stores and opticians	2	4.8	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	2.4	2.3
Toys, hobby, cycle and sport	4	9.5	5.2
Jewellers	3	7.1	5.0
Charity/second-hand	4	9.5	8.4
Other comparison retailers	3	7.1	2.9
Total	**42**	**100.0**	**100.0**

Source: Experian Goad, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

5.6 The centre provides most of the GOAD Plan comparison categories, with the exception of china/glass/gifts/fancy goods and variety/department/catalogue. The choice in represented categories is relatively low. The centre has a below average proportion of clothing/footwear and bookseller/arts/crafts/stationers and a higher proportion of DIY/hardware/homewares, furniture/carpets/textiles, cars/motorcycles/motor accessories and toys/hobby/cycle/sport.

5.7 North Camp has a good range of non-retail service uses, with all categories present apart from travel agents. Categories are mostly well represented (see Table 5.3) with the number of fast food/takeaways significantly above the national average.

5.8 The proportion of restaurants/cafes is in line with the national average, whereas banks/other financial services and estate agents/valuers are below the national average.

Table 5.3 North Camp Analysis of Selected Service Uses

Type of Unit	North Camp		% UK Average*
	Units 2014	%	
Restaurants/cafés	12	23.1	23.3
Fast food/takeaways	13	25.0	15.2
Pubs/bars	3	5.8	7.6
Banks/other financial services	4	7.7	12.9
Betting shops/casinos	2	3.8	4.0
Estate agents/valuers	3	5.8	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	14	26.9	22.9
Laundries/dry cleaners	1	1.9	2.2
Sub-Total	**52**	**100.0**	**100.0**
Other A1 Services	3	-	-
Total	**55**	**-**	**-**

Source: Experian Goad, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

5.9 There were 15 vacant units within North Camp at the time of the survey, giving a vacancy rate of 12.1%, which is the same as the national average. The vacancy rate was similar in 2003. Vacant units are dispersed throughout the centre and there are no obvious concentrations.

Commercial and Property Indicators

5.10 Most shop premises are small (under 100 sq.m) period buildings rather medium – large (over 200 sq.m) modern premises.

5.11 Valuation Office (VOA) retail rents for North Camp are shown below.

1 Alexandra Road £185-£250 psm (higher levels at the south end);

2 Camp Road £190 psm;

3 Lynchford Road £145-£175 psm; and

4 Queens Road £130 psm.

5.12 Zone A rental levels within the prime pitch in Camp Road is £190 per sq.m. Some units on Alexandra Road have higher rents, probably due to the main road frontage and passing trade.

5.13 Retail rental levels are much weaker in North Camp than in Aldershot and Farnborough.

Shopper Views

5.14 Respondents to the household survey undertaken by NEMS in September 2014 were asked what, if anything, would make them shop more often in North Camp District Centre.

5.15 Around 63% responded that "nothing" would make them shop more often in North Camp. The other most popular responses related to a better choice of shops in general (12%), cheaper car parking (5%) and better quality shops (3%). Improved shopping environment, better choice of clothing stores, more large shops and more car parking were all mentioned by 2% of respondents.

Accessibility and Movement

Car Parking

5.16 Within the centre there are two public car parks providing 250 car parking spaces, Peabody Road (110 spaces) and Napier Gardens (150 spaces). These car parks cost between 20-30 pence per hour. There are also some on-street parking spaces within the centre.

5.17 The household survey indicated that only a small proportion (1.6%) of households consider that more car parking would make them shop in North Camp more often, which suggests there are low levels of dissatisfaction with parking provision. However 6% mentioned cheaper or free car parking.

Public Transport

5.18 North Camp has fewer bus routes than Farnborough and Aldershot town centres. The main bus stops are located on Lynchford Road, Queens Road and Alexandra Road. Frequent services include bus numbers 41 and 42. These routes primarily serve the Aldershot and Farnborough areas.

5.19 The train station in North Camp is approximately half a mile from North Camp district centre. The station is on the First Great Western rail link from Reading to Gatwick. Trains link North Camp with Farnborough North train station, Wokingham, Guildford, Dorking, Redhill, Reading and Gatwick.

Traffic Congestion and Accessibility

5.20 Lynchford Road has the heaviest traffic, but shops and services in this area benefit from pass-by trade. Traffic levels are relatively low in other parts of the centre. Pedestrian flows are moderate throughout the centre. North Camp is well signposted from the surrounding area and there are two surface level car parks in addition to on-street car parking.

Pedestrian Access and Movement

5.21 North Camp is not a purpose built centre. It consists of a number of separate parades. The centre's linear structure does not provide a clear circuit for pedestrians. Most shop units are located along Camp Road and Lynchford Road. Lynchford Road gets congested as it is a narrow slip road with on street parking along one side of the street.

5.22 North Camp is un-pedestrianised and the pavements are relatively narrow in places, but pavements are adequate to deal with moderate pedestrian flow. On-street parking can obstruct pedestrians trying to cross the roads.

Environmental Quality

5.23 North Camp contains a mix of Victorian and inter-war properties with some 1960s infill development. The centre is well maintained and there is attractive lighting in Camp Road. The pavements are narrow in places but the quality of materials in Camp Road and on Lynchford Road is good. There is some street furniture and a good provision of litter bins and signage, which contribute to the shopping environment. The environmental quality of Queens Road and Alexandra Road is not to the same standard as Camp Road.

5.24 The number of cars parked in front of the shopping parades is detrimental to the overall quality of the environment at North Camp district centre, especially where pavements are narrow.

5.25 Some shop frontages are not well maintained and could be improved.

North Camp District Centre's Strengths and Weaknesses

Strengths

1 North Camp Road district centre has a reasonable range of shops and services for a small centre, catering for the day-to-day needs of local residents and employees, e.g. convenience shops and lower order comparison shops.

2 There is a limited range of comparison shops, but there is a good representation of specialist independent shops. Motor vehicle related outlets are particularly well represented.

3 The centre has a good provision of on-street and off-street car parking, providing opportunities for passing trade.

4 There is limited traffic congestion through the centre.

5 The green space to the south of the centre enhances the environment and the monument at the end of Camp Road gives the centre a focal point.

Weaknesses

1 North Camp lies within the catchment areas of Farnborough and Aldershot, which are much larger centres. The proximity of these centres restricts North Camp's potential catchment area.

2 There are few national multiple retailers. The retail units are converted residential premises and are generally small and unsuitable for modern retailers.

3 Some shop frontages could be improved.

4 The centre is linear in structure and the centre is fragmented and poorly defined. This linear structure and breaks in retail frontage inhibits pedestrian movement particularly to peripheral sections of the centre.

5 The centre has no large food store suitable for bulk food shopping.

6 Paving is poor and narrow in places impeding pedestrian movement.

7 The centre has a limited selection of comparison shops. The centre has a limited number of comparison multiple retailers and higher order comparison shopping such as clothing and footwear.

North Camp Strategy

5.26 North Camp falls within the catchment areas of Aldershot and Farnborough, as well as larger sub-regional centres outside the Borough. There are limited opportunities to expand facilities within North Camp. The strategy for North Camp should seek to consolidate local shops and services rather than expand its role as a small district centre. The centre should continue to serve its local area for day to day shopping, local services and basic lower order comparison shopping.

5.27 As indicated in Section 2, the projection for Class A1 to A5 floorspace within North Camp is relatively low, ranging from around 300 to 400 sq.m gross (depending on the population growth scenario).

5.28 Vacant premises are capable of accommodating these projections. For example if the current vacancy rate reduced to 8% (the pre-recession national average) then five reoccupied units in North Camp could accommodate about 1,000 sq.m gross (700 sq.m net) of Class A1 to A5 floorspace. If this reduction in vacant units is achieved, then the overall Class A1 to A5 floorspace projection up to 2032 could be accommodated.

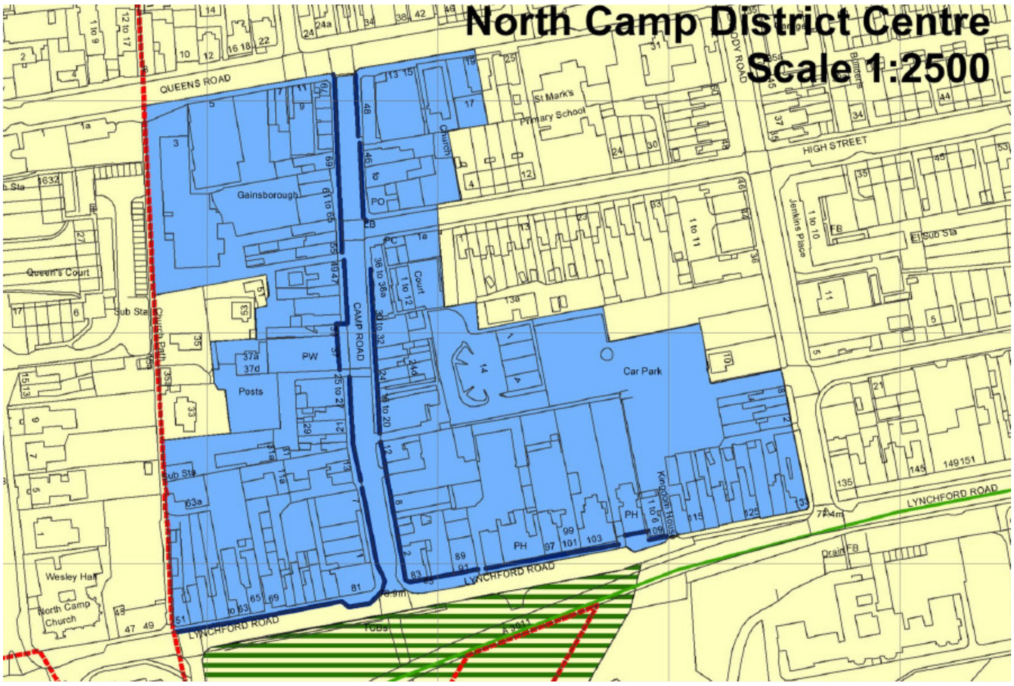
5.29 The three sites previously considered within North Camp are set out in Appendix 3. No sites were identified as having ‘good’ development potential in North Camp. The site with the most potential in North Camp is St Alban’s Hall which could be suitable for change of use to accommodate a large restaurant or pub. Alternatively, the site could be redeveloped to include residential and retail on the ground floor.

5.30 The priority for North Camp should be the re-occupation of vacant shop units and small in-fill developments or extensions.

District Centre Boundary and Primary Shopping Area

5.31 The shopping core of North Camp is defined (dark blue line in Figure 5.1 below) in the Rushmoor Local Plan Review as Camp Road (1-79, 2-48 incl.) and Lynchford Road (51-109). The district centre boundary (shaded light blue) includes some additional shopping frontages but does not include all retail and service uses at North Camp.

Figure 5.1: North Camp Shopping Core - Extract from Rushmoor Proposals Map, October 2011



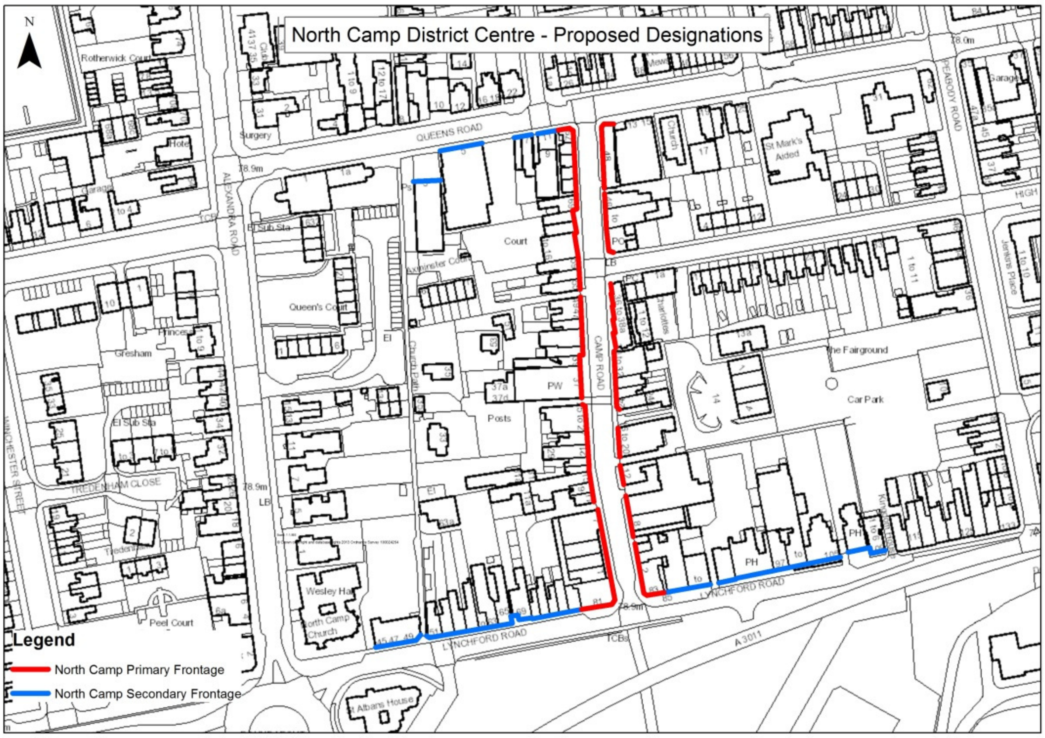
5.32 In North Camp it is not be necessary to define a separate PSA and centre boundary. North Camp District Centre is much smaller and there is no concentration of other main town centre uses beyond the shopping core/PSA.

5.33 The Council should consider extending the district centre boundary to include the Lloyds TSB bank at 47-49 Lynchford Road.

5.34 Numbers 109 to 129 on Lynchford Road include a number of breaks within the shop frontage and this block could be excluded from the District Centre boundary. The proposed amendments are shown in Figure 5.2 below.

5.35 The adjusted centre boundary would continue to provide guidance on the area of search for the sequential approach for retail and other main town centre uses.

Figure 5.2: Suggestion North Camp District Centre Boundary



Shopping Frontages

5.36 Policy TC2 of the Local Plan Review requires that within each of the frontages within the North Camp core shopping area, the proportion of non-A1 units does not exceed 40%. The proportions of Class A1 uses in each area of the shopping core (as currently drawn) are as follows:

North Camp	Class A1	Non-A1	Total Units	% Non-A1
1-79, 2-48 Camp Road	39	17	56	30.4
51-109 Lynchford Road	15	9	24	37.5

5.37 The maximum threshold for non-A1 units (40%) has not been breached. The existing 40% threshold should remain unchanged in Camp Road. On Lynchford Road and Queens Road a more flexible 50% threshold could be adopted.

Impact and Sequential Tests

5.38 Development of more than local significance (over 250 sq.m gross) within one kilometre of North Camp District should consider sequential sites within North Camp District Centre and also within Farnborough and Aldershot Town Centres.

5.39 Trading levels within North Camp are relatively low and the retail floorspace projections are modest. Out of centre development that competes with the centre for local trade could have a detrimental impact on North Camp centre.

5.40 Retail and other main town centre uses within one kilometre of North Camp over 250 sq.m gross should be required to prepare a retail impact assessment. A reduced locally set threshold of 250 sq.m gross is appropriate based on the floorspace projections and North Camp's vitality and viability.

6.0 Conclusions

6.1 This report considers appropriate policy approaches and measures to inform future planning for retail and town centre uses in the Borough. The emerging Rushmoor Local Plan development plan document will be a Borough-wide planning policy document that will guide regeneration and development in Rushmoor. The comments in this section are intended only for consideration in the emerging Rushmoor Local Plan and other development plan documents.

6.2 Paragraph 23 of the NPPF indicates local authorities should define a network and hierarchy of centres that is resilient to anticipated future economic changes. This approach is consistent with the Rushmoor Core Strategy.

6.3 Development Plan policies should continue to provide clear guidance on the definition of centres within the Borough. The definition of Farnborough and Aldershot as town centres is consistent with the NPPF. The strategy for Farnborough and Aldershot should seek to consolidate the town centre's role within the wider shopping hierarchy.

6.4 Development Plan policies should define separate town centre boundaries, primary shopping areas, primary shopping frontages, secondary shopping frontages and café/restaurant quarters within Farnborough and Aldershot, in order to promote an appropriate mix of town centre uses. In North Camp District Centre a district centre boundary and shopping frontages would be appropriate.

6.5 The Class A1 to A5 retail floorspace projections (over and above commitments) can be accommodated within vacant shop units and development opportunities within or on the edge of designated centres.

6.6 Aldershot and Farnborough should be the main focus for large-scale retail and leisure development (for example over 250 sq.m gross), where the development has a reasonably wide catchment area and seeks to serve a large part (if not all) of the Borough. Each development proposal must be considered on its individual merits and floorspace maximums should not be identified or strictly applied.

6.7 Growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within the Borough. Aldershot and Farnborough should seek to compete more effectively with other competing towns, particularly Camberley, Fleet and Farnham. Aldershot and Farnborough provide the best prospects for attracting new investment and major retail/ leisure development in the Borough.

6.8 Development within all centres (large or small) should be appropriate in terms of nature and scale in relation to the role of the centre. Developments which are likely to attract customers from a much wider area than the centre's existing catchment area may be considered to be out-of-scale with the role of the centre, and may be better located within larger centres i.e. Farnborough and Aldershot.

6.9 Development plan policies need to consider the need for a proportionate locally set impact threshold. Development smaller than 2,500 sq.m gross could have a significant adverse on centres in Rushmoor. A reduced threshold of 1,000 sq.m gross should be considered in the Borough. A lower threshold of 250 sq.m gross should be considered for developments that will compete with North Camp.

Appendix 1 Farnborough Opportunities

Sites in Farnborough

Site	Current Use	Potential Use	Timescale	Scale	Development Prospects
Site F1: Princes Mead shopping centre / Asda car park	Car park	Extension to shopping centre. A screening opinion request has been submitted for development in the car park adjacent to the Princes Mead shopping centre (14/00471/SCREEN) showing three retail units with a total of 2,880 sq.m gross at ground floor level, with the potential for full mezzanine cover within all units.	Short to medium term	Large scale (up to approx. 5,750 sq.m gross)	Good
Site F2: Existing Employment Land adjacent to B&Q	Employment uses	Retail warehousing or large format stores. Site is allocated as a key employment site and redevelopment would depend on the acceptability of loss of employment land.	Long term	Large scale (approx. 4,000 sq.m gross)	Poor
Site F3: Land off Northmead, to the north of Princes Mead shopping centre	Identified in the 2004 study for potential retail warehousing or leisure development, but site now developed for residential use.	N/A	N/A	N/A	Not available
Site F4: Land off Westmead	Car park	Potential mix of uses, including small scale A1/A3 uses at ground floor with residential above	Short to medium term	Small scale (up to 300 sq.m gross)	Reasonable
Site F5: Car park off Kingsmead, to the south of shopping centre	Car Park	Leisure or retail uses, as an extension to the existing core shopping area	Medium to long term	Large scale (up to 4,000 sq.m gross)	Reasonable

Site	Current Use	Potential Use	Timescale	Scale	Development Prospects
Site F6: Iceland Queensmead	Iceland Store and adjacent unit	Retail or leisure uses. Planning permission has been granted for a new bingo hall on part of this site. It is therefore not considered to be currently available for future redevelopment.	Long term	Medium scale (up to 1,000 sq.m gross)	Reasonable
Site F7/F8: Library and Police Station sites	Farnborough Library and Police Station	Ground floor retail/leisure uses and residential above. Will depend on the relocation of the existing uses on the site.	Medium to long term	Large scale (up to 3,000 sq.m gross)	Reasonable
Site F9: Kingsmead Shopping Centre	Shopping centre	Various applications have been approved for extensions to centre to include cinema and additional A1, A2, A3 and A5 uses. The approved retail floorspace has been taken into consideration in the capacity assessment so this site would not absorb any of the additional requirements.	Short term	N/A	Good
Site F10: Northern Quarter	This area has now been redeveloped for Sainsbury's supermarket and comparison units.	N/A	N/A	N/A	N/A

Appendix 2 Aldershot Opportunities

Sites in Aldershot

Site	Current Use	Potential Use	Timescale	Scale	Development Prospects
Site A1: Alexander House	Residential with retail at ground floor	No longer available for development	N/A	N/A	N/A
Site A2: Aldershot Conservative Club	Community centre and car park	Ground floor retail/extension to The Arcade	Medium to Long term	Small scale (up to 500 sq.m gross)	Reasonable
Site A3: Stafford House	Residential	No longer available for development	N/A	N/A	N/A
Site A4: Royal Mail Buildings/ Pickford House	Royal Mail sorting office and residential	Potential for A1/A2/A3 retail units. Possible requirement to relocate Royal Mail facilities and listed building on the site may constrain development opportunities.	Medium/long term	Medium scale (up to 1,500 sq.m gross)	Poor
Site A5: Former Charters Car Centre	Now redeveloped for residential	No longer available for development	N/A	N/A	N/A
Site A6: QP Group, Victoria Road/Stratfield Pl/Offices/Birchett Road Car Park	Mixed use – office, retail, vacant buildings, car park	Potential to extend town centre shopping area with links to Wellington Shopping Centre, retail use at ground floor and leisure, office or residential uses above.	Long term – would require land assembly	Large scale (approx. 5,000 sq.m)	Reasonable
Site A7: Princes Hall/Magistrates Court/Police Station	Police station and theatre. Forms the remainder of the Westgate site that has not been redeveloped.	Potential for police station and Princes Hall redevelopment, most likely to include a mix of leisure and residential use. Potentially to include new theatre.	Medium term	Medium scale (up to approx. 2,000 sq.m gross)	Good

Site	Current Use	Potential Use	Timescale	Scale	Development Prospects
Site A8: High Street/Court Road/Wellington Avenue	Car wash, bingo hall, church and council car park.	Redevelopment to include retail and leisure – potentially retaining existing uses including bingo hall. May also need to retain or replace car parking.	Short to medium term	Large scale (up to approx. 4,000 sq.m gross)	Good
Site A9: Corner of Union Street and Grosvenor Road	Now redeveloped to include retail on ground floor	No longer available for development	N/A	N/A	N/A
Site A10: The Galleries	Vacant shopping centre	Redevelopment to include Class A1 – A5 at ground floor level with residential uses or other uses above	Short to medium term	Large scale (up to approx. 5,000 sq.m gross)	Good
Site A11: Corner of Union Street/ High Street	Vacant buildings and an A1 retail unit.	Potential for retail or leisure redevelopment in retail location	Short term	Medium scale (approx. 1,700 sq.m gross)	Good
Site A12: Hippodrome House and Victoria Road	Retail at ground level, office above and car parking	Redevelopment to include more retail at ground floor and open site up to improve legibility through the centre	Long term	Large scale (approx. 3,600 sq.m gross)	Good

Appendix 3 North Camp Opportunities

Sites in North Camp

Site	Current Use	Potential Use	Timescale	Scale	Development Prospects
Site N1: Car Park off Peabody Road	Car Parking, existing industrial uses	Small supermarket or parade of retail units	Medium to long term – land assembly would be required	Medium scale (approx. 2,000 sq.m gross)	Poor
Site N2: Land on corner of Camp Road and High Street	Now redeveloped to include retail at ground floor	No longer available for development	N/A	N/A	N/A
Site N3: St Alban's Hall, Lynchford Road	Office	Change of use to A3/A4 or redevelopment to include retail	Short term	Small scale (up to 500 sq.m gross)	Reasonable

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