

### **3.0 THE SHOPPING HIERARCHY**

#### **Major Shopping Centres in Winchester and the Surrounding Area**

- 3.1 Winchester City Centre is the main shopping centre within Winchester District, and attracts shoppers from across the City and beyond. Winchester also competes with other major shopping destinations including Andover, Basingstoke, Eastleigh, Fareham, Romsey, Hedge End and Southampton. As demonstrated by the household survey results, the catchment areas of these centres overlap. Southampton is the main regional shopping centre in the area and attracts shoppers from Winchester. Winchester, Andover, Basingstoke, Eastleigh and Fareham are smaller town centres than Southampton. Nevertheless, Winchester is a relatively large shopping centre that serves Winchester urban area and the immediate surrounding rural area. Winchester is also a major destination for tourist visitors and commuters from beyond the immediate area.
- 3.2 A Hillier Parker report published in 1995 ranked Winchester as 110<sup>th</sup> in Great Britain. The centre was recorded as having 49 comparison multiple retailers in 1995. The 1995 ranking placed Winchester below Basingstoke (90<sup>th</sup>, with 56 multiples) and Southampton (22<sup>nd</sup>, with 96 multiples), but above Fareham (173<sup>rd</sup>, with 34 multiples), Andover (196<sup>th</sup> with 30 multiples) and Eastleigh (207<sup>th</sup>, with 27 multiples). Winchester national rank rose by 21 places between 1984 and 1995 (Hillier Parker, 1995), due in part to the occupation of the Brooks Centre.
- 3.3 Management Horizons' Europe UK Shopping Index 2000/2001 classifies Winchester as a sub-regional shopping centre, and the City Centre is ranked it 125<sup>th</sup> in Great Britain. This rank represents a slight improvement on the 1995/96 rank (129<sup>th</sup>). The Management Horizons rank for other comparable shopping centres in the area is shown in Table 3.1. This ranking is based on a scoring system for retail facilities present in each town rather than just the number of multiples used by Hillier Parker.
- 3.4 Southampton is now ranked 28<sup>th</sup> and highest in the west Hampshire area. This ranking may have improved following the occupation of the West Quay development since September 2000. Winchester is also ranked below Basingstoke (125<sup>th</sup> compared with 116<sup>th</sup>). However, Basingstoke's rank is also expected to improve following the completion of the Festival Centre in October 2002.

**Table 3.1 Management Horizons UK Shopping Index 2000/01**

Centre	MHE Classification	MHE Ranking		
		2000/01	1998/99	1995/96
Winchester	Sub-Regional Centre	125	111	129
Andover	Sub-Regional Centre	193	199	193
Basingstoke	Sub-Regional Centre	116	104	79
Eastleigh	Major District Centre	231	232	234
Fareham	Sub-Regional Centre	182	178	156
Southampton	Major Regional Centre	28	26	25

Source: *Management Horizon Europe (2001)*.

- 3.5 The remainder of this section provides an overview of the existing shops and services available within Winchester City Centre in comparison with competing centres. The quantitative and qualitative scope for additional retail facilities is examined in Sections 7 and 8.

### **Winchester City Centre**

- 3.6 Winchester City Centre serves a number of roles as a retail, employment, service, tourist and leisure centre. These roles include:
- *convenience shopping* - serving the local population and employees, such as Iceland, Sainsbury's and Somerfield food stores, newsagents, specialist food shops, chemists and dry cleaners;
  - *comparison shopping* – a wide range of national multiples/including variety stores such as Marks and Spencer, Debenhams, Bhs and Boots which are supported by a range of clothing and specialist shops;
  - *entertainment and leisure* - including a theatre, pubs, cafés and restaurants;
  - *services* - including banks, estate agents, travel agents and hairdressers;
  - *employment centre* - including B1 and Class A2 offices; and
  - *tourism centre* - including the Cathedral.
- 3.7 GOAD Plan information for May 2002 indicates that Winchester City Centre had 322 ground floor commercial premises, with a total ground floor area of approximately 52,954 sq m gross (570,000 sq ft).
- 3.8 Winchester is a linear shopping centre with a reasonable range of shops, as shown in Table 3.2. Winchester City Centre has a higher than average proportion of comparison retail units, compared with the GOAD national average, and a low level of

vacant units. The City Centre has a similar proportion of service uses when compared with the national average.

- 3.9 Winchester is similar to many reasonably sized town centres in that it has a lower proportion of units and retail floorspace devoted to the sale of convenience goods. However, the Sainsbury, Iceland and Somerfield stores, together with the Marks and Spencer Food Hall, offer a reasonable range of goods suitable for basket and top-up food shopping. However, facilities suitable for main and bulk food shopping are not available.

**Table 3.2 Winchester City Centre Use Class Mix**

Type of Unit	Number of Units in Winchester	Proportion of Total Number of Units	
		Winchester	GB Average
Convenience Retail	22	6.8%	9.5%
Comparison Retail	181	56.2%	48.4%
Service	95	29.5%	29.9%
Other Misc.	3	1.0%	1.5%
Vacant	21	6.5%	10.7%
<b>Total</b>	<b>322</b>	<b>100.0%</b>	<b>100.0</b>

Sources: Goad, May 2002

#### *Retailer Representation*

- 3.10 Winchester City Centre has 181 comparison goods retailers (GOAD, May 2002). A detailed breakdown of these comparison goods shop units is shown in Table 3.3. A high number of these retailers are independents, although many national high street multiples are represented in Winchester. The range of multiple and independent specialist traders provides a reasonable balance of facilities. The key anchor tenants are Marks & Spencer, Bhs, Debenhams, Beales and Boots.
- 3.11 Winchester City Centre has 29 clothing/fashion multiple retailers as shown in Appendix D. There are a small number of high quality fashion retailers such as Jaeger and Russell & Bromley. However, most of the clothing/fashion multiples are middle quality retailers. In comparison Southampton has 79 clothing/fashion multiples including a good selection of high quality retailers, including Austin Reed, Jaeger, Karen Millen, Planet and Russell & Bromley. Basingstoke (including the Festival Centre) also has a higher number (55) of clothing/fashion multiples than Winchester, but does not have the highest quality retailers. Winchester has a slightly better provision of clothing/fashion shops than Andover, Eastleigh and Fareham.

- 3.12 Winchester has a reasonable provision of department and variety stores when compared with Andover, Eastleigh and Fareham. However, these stores are not comparable in terms of the range and choice of goods sold in larger departmental stores in Southampton and Basingstoke.
- 3.13 Winchester has a better selection of electrical and telephone multiples than Andover, Eastleigh and Fareham. However, Southampton and Basingstoke have a significantly greater provision, as shown in Appendix D.
- 3.14 There are 28 other comparison multiples in Winchester, such as card shops, book shops jewellers and music shops. This provision is comparable to the offer in Andover, Eastleigh and Fareham, but significantly below the provision in Southampton and Basingstoke.
- 3.15 Winchester City Centre has a reasonable representation in all of the main comparison goods sectors as shown in Table 3.3. The centre has a similar proportion of clothing and fashion shops compared with the national average. Large town centres generally have a higher proportion of clothing shops when compared with small town and district centres.
- 3.16 Significant trade from tourists and day visitors may help to explain the high proportion of gift/fancy goods shops and bookshops. Motor accessories and florists are the most obvious areas of under-representation.

**Table 3.3: Winchester City Centre Breakdown of Comparison Units**

Type of Unit	Winchester City Centre		UK Average*
	Units	%	%
Clothing and Footwear	45	24.9	25.5
Furniture, carpets and textiles	15	8.3	10.0
Booksellers, arts, crafts and stationers	24	13.3	9.3
Electrical, gas, music and photography	15	8.3	11.3
DIY, hardware & homewares	9	5.0	6.4
China, glass, gifts & fancy goods	8	4.4	3.9
Cars, motorcycles & motor access.	1	0.6	3.1
Chemists, drug stores & opticians	15	8.3	7.6
Variety, department & catalogue	10	5.4	2.3
Florists, nurserymen & seedsmen	1	0.6	2.3
Toys, hobby, cycle & sport	10	5.5	5.7
Jewellers	14	7.7	4.6
Other comparison retailers	14	7.7	8.0
<b>Total</b>	<b>181</b>	<b>100.0</b>	<b>100.0%</b>

Sources: GOAD, May 2002

\* UK average relates to all town centres surveyed by Goad Plans

### *Service Uses*

- 3.17 The City Centre has 95 service units, 29.5% of the total number of ground floor retail and service units, slightly below the national average of 29.9%. A breakdown of these service uses is provided in Table 3.4.
- 3.18 Winchester has a high proportion of estate agents (Class A2 units) compared with the national average. The proportion of restaurants and cafes is slightly below the national average. The proportion of some *local needs* services is lower than the national average, for example dry cleaners. However, the proportion of hairdressers and travel agents is higher than the national average. The actual number of *local needs* services available offer a reasonable choice for local residents and employees.

**Table 3.4: Winchester City Centre Service Use Analysis**

Type of Use	Winchester City Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	29	30.5	40.9
Banks & financial and other services	18	18.9	18.6
Estate agents and valuers	19	20.0	11.4
Travel agents	7	7.4	6.5
Hairdressers & beauty parlours	21	22.1	19.0
Laundries and dry cleaners	1	1.1	3.6
<b>Total</b>	<b>95</b>	<b>100.0</b>	<b>100.0</b>

Source: GOAD, May 2002

\* UK average relates to all town centres surveyed by Goad Plans

### *The Supply of Commercial Premises*

- 3.19 The level of vacant units within Winchester City Centre was less than two thirds of the national average, 6.5% compared with 10.7%. There were 21 vacant units in Winchester in May 2002. Most of these vacant units are small units and there are no obvious concentrations of vacant units. Goad data suggests that vacant units have a ground floor area of 3,250 sq m gross, 6.1% of the total ground floor area (the Great Britain average is higher at 8.3%) which includes the large vacant unit adjacent to the Post Office. At present the large majority of vacant units in Winchester City Centre are in secondary areas rather than the High Street. There are few medium or large retail units (over 200 sq m gross) available within the High Street, and there are limited opportunities for new multiple retailers looking to locate within Winchester's primary shopping area. In addition many of the retail/service properties in Winchester

City Centre are historic buildings, many of which are small and not ideal for multiple retailers.

### *Property Yields*

- 3.20 Commercial yields are a measure of property values which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.
- 3.21 Prime retail yields within Winchester City Centre have increased (worsened) between 1997 to 2000, but are now recovering from 7.50% to 6.75% in 2002. Prime retail yields in Winchester are similar to those achieved in other centres in the area as shown in Table 3.6. However, Southampton and Basingstoke's yields are currently better than those in Winchester.

**Table 3.5 Retail Yields**

<b>Centre</b>	<b>April 2002</b>	<b>April 2001</b>	<b>April 2000</b>	<b>April 1999</b>	<b>April 1998</b>	<b>April 1997</b>
Winchester	6.75	7.50	7.50	5.00	5.00	5.00
Andover	7.50	7.50	7.50	7.50	7.50	7.50
Basingstoke	6.50	7.00	7.00	5.75	5.75	5.75
Eastleigh	7.50	7.50	7.50	7.50	7.50	7.50
Fareham	8.00	8.00	8.00	8.00	8.00	7.50
Southampton	5.00	5.00	6.00	6.00	5.00	5.00

*Source: Valuation Office (Spring 2002)*

## **Summary of Winchester City Centre's Strengths and Weaknesses**

### *Strengths*

- Winchester is an important destination, attracting visitors from a wide area. It has a diverse role attracting visitors for a variety of reasons including shopping, employment, leisure and tourism.
- The historic character and natural setting of the City Centre creates an attractive and pleasant shopping environment. A number of improvement works have been undertaken within the City Centre further enhancing the quality of the shopping environment.
- The City Centre has a reasonable choice and range of shops and services, which cater for both locals and visitors.

- The City Centre offers a good range of specialist retailers, including fashion, antiques and craft retailers.
- The vacancy rate in the centre is very low and the demand for premises appears to be strong.
- There is a variety of car parking provision located close to the City Centre. However, this primarily caters for short stay visitors. In addition there is a more limited provision of short stay on-street car parking.
- There is clear signage for pedestrians assisting pedestrian movement within the City Centre.

### *Weaknesses*

- The bus station area is dated and unattractive and does not contribute to the high quality of the rest of the City Centre. Furthermore, the city's railway station is divorced from the main centre.
- The quality of the streetscape in some parts of the centre is now looking tired, e.g. in the Kings Walk and Jewry Street area.
- Traffic congestion on the main routes into Winchester and around the City Centre can increase drive times into the centre.
- There is a shortage of modern retail premises, particularly within the prime shopping area, which are suitable for new multiple retailers. Many of the retail and service units in the City Centre are small and do not meet the requirements of many operators. In addition, many premises are listed and opportunities for alterations or extensions are limited.
- Winchester is relatively assessable to Southampton, which has a superior range and choice of comparison shopping.