Winchester Town Centre Health Check

Introduction

Winchester City Centre is an attractive, historic centre, all of which is within the Winchester Conservation Area. The centre serves a sub regional function in the retail hierarchy with comparison retail floorspace extending to 26,662 sq.m (287,000 sq.ft) net with conveinience floor space extending to some 2,694 sq.m (29,000 sq.ft) net.

The definition of Winchester City Centre by Chas.E.Goad indicates an extensive, largely linear centre which stretches east to west along the High Street for over 650 metres, as well as 350 metres north along Jewry Street

We have analysed the city centre both as a whole (Goad definition) and also in term of its Primary Shopping Area (Winchester Local Plan definition) and Secondary Shopping Area (remainder of the centre). The Draft Deposit Local Plan 1994 defines the Primary Shopping Area as the pedestrianised High Street, Market Street, the retail section of Little Minister Street, Silver Hill, most of St George's Street, the extent of Upper Brook Street and Middle Brook Street up to and including the Brooks Centre itself.

Quality Of The Environment

In terms of environmental quality, Winchester provides an attractive retail setting with an extensive pedestrianised primary shopping core as well as a high proportion of historic buildings. The centre is likely to continue to attract the tourist and leisure shopper which will help underpin the City's comparison shopping role .

Street furniture and landscaping is of a high standard throughout the pedestrianised core and there are numerous buildings of architectural and historical merit, particularly the Cathedral and the Guildhall towards the eastern end of the High Street. Whilst the High Street provides a quality shopping environment, scope exists for considerable further environmental improvements to St Georges Street and the High Street junction with Jewry Street and Southgate Street where the streetscape is dominated by the car acting as a barrier to the most western part of the High Street.

Unit sizes tend to be small in Winchester with many shops being long and narrow in configuration with limited opportunity available for 'bulky goods' shopping. Retailer demand for larger stores and servicing arrangements are frequently constrained by the historic street pattern and built form in the city centre.

Winchester City Centre plays a key retailing role and is an extremely vibrant and active centre during the day however its night time activity is somewhat more subdued due to the concentration of retail trading and services along the High Street. Night time trading, such as cafe's, bars and restaurants are relatively dispersed throughout the pedestrianised section of the High Street but their appear to be activity hotspots around the cathedral square and at the junction with Jewry Street with its concentration of restaurants and the imminent opening of both the Firkin and Weatherspoon pubs.

Mix Of Uses

The centre, benefits from not only being the 'County Town', but also an historic cathedral city and major tourist attraction. It offers a significant comparison shopping base anchored by two branches of Debenhams department store (Market Lane site is currently undergoing refurbishment), Marks & Spencer, Bhs, Boots the Chemist and WH Smith with convenience shopping being offered by a town centre J.Sainsbury supermarket and Somerfield supermarket. The majority of comparison retail is located along the pedestrianised area of the High Street where the majority of national multiple retailers are located.

The city benefits from a wide range of national multiple retailers, including fashion retailers such as Next, River Island, Blazer, Dorothy Perkins and Russell & Bromley amongst others. Other significant multiples include Waterstones, Vision Express, Clinton Cards, The Body Shop and JJB Sports and a number of independent traders such as Dinghams Household Goods and Gilberts Books. In addition to the two supermarkets there are a number of multiple convenience retailers such as Iceland, Superdrug and Holland & Barratt. In terms of multiple representation Winchester has seen some small increases in prime areas and decreases in secondary areas with independent traders decanting, as would be expected with the trend towards retail concentration. The commitment of BHS in 1996 also improved the town's variety store
representation.

The most notable areas in terms of increased representation are the leisure retail groups including gifts, books and sports goods. which account for a relatively high proportion of the centres shops. Recent lettings include several independent craft shops such as Burnwoods & And Albert and further concentration of designer clothing outlets which reflects the town's strength as a tourist attraction, its percieved affluence and the quality of its shopping environment.

Other attractions at the centre include significant representation by financial and professional services especially estate agents and building societies as well as a significant number of cafes, restaurants and fast food outlets with notable examples including the Richoux Restaurant, Muswells, Pierre Victore and Pizza Hut amongst others. Additional attractions include Wolvesey Castle, The Cathedral, The Screen, City Museum and the Great Hall as well as a wide range of other historic buildings and monuments in addition to the Winchester College and civic functions of the County Council.

There are 115 service units (33% of total units) in the city centre which is notably higher than the national average of 25%. This, in part, reflects Winchester's importance as an administrative centre.

An outdoor market occurs on a split site at Middle Brook Street with a varying number of stalls selling a variety of goods including fruit & veg, flowers, fabrics, household goods and antiques. It has aspirations to relocate a larger, potentially covered, site and extend its trading days which currently include Wednesday, Thursday, Friday and Saturday. The market appeared to be well used right through the morning and afternoon on the days we visited the city centre. Both the public space adjacent to the Brooks Centre and Kings Walk were also well utilised giving the area a very lively atmosphere.

A user survey of the market was carried out in 1996. The market received the highest opinion scores for friendliness of staff and quality of service/customer care but scored lowly for choice and range and quality of goods. Aspects of the market that visitors particularly liked were its atmosphere, convenient position and its compactness. However it was suggested that it could be improved by further increasing the variety of stalls and placing the market on a larger site so that all the stalls could be placed together rather than in two locations as it is currently.

Vacancies

In terms of vacancies, the general pattern has reflected the growth and recession trend of the past decade. Vacancies in 1985 stood at 6.3% for all units reducing to 5.3% in 1990. A significant increase to 19.2% in 1993 reducing again to 10.5% in 1996 and currently standing at 12.6%. The significant increase between 1990 and 1993 reflects the opening of the Brooks Centre in which a large number of small units remained vacant prior to their redevelopment for the Bhs store, as well as the effects of the recession generally on the town.

The city centre as a whole has a total of 348 units, 199 of which are retail units. These retail units comprise 177 comparison goods stores (50.86% of total units) and

22 conveinience stores (6.32%). According to the Chas.E.Goad summary report for Winchester (May 1996) the national average comparison goods figure was 53.9%, therefore Winchester has slightly less comparison floorspace than average .

The retail focus of Winchester is concentrated along the pedestrianised High Street. There are a total of 187 units in Winchester city centre's Primary Shopping Area, comprising 129 retail units 37 service units and 29 vacant units. The retail units comprise 114 comparison shops (61% of all units and 88% of all shops) and 15 conveinience stores (8% of all units and 11% of all shops). 72 of the 83 (87%) national multiple retailers are found in the Primary Shopping Area. The vacancy rate for the Primary Shopping Area is 15.5%, which is above the national average of 11.7%. Vacant units within the Brooks Centre account for 58% of all vacancy in the Primary Shopping Area.

The Secondary Shopping Area has a total of 161 units comprising 70 retail units, 78 service units and 13 vacant units. The retail units comprise of 63 comparison shops (39% of total units and 90% of all shops) and 7 conveinience stores (4% of total units and 10% of all shops). 11 of the 83 (13%) multiple retailers are in the Secondary Shopping Area. The vacancy rate for the Secondary Shopping Area is 8%.

There are currently 42 available premises along the primary and secondary frontages, including the Brooks Centre which currently has 17 vacant units. The units available are all less than 92 sq.m (1,000 sq.ft) with the majority of retailers currently interested in th uptake of town centre floorspace requiring between 92 sq.m (1,000 sq.ft) and 557 sq.m (6,000 sq.ft).

Although Winchester has lost a scattering of fashion and durable goods retailers over the last six years, vacancies remain low particularly in primary and secondary pitches and retail demand is improving, the recent letting to Bhs in the Brooks Centre being a significant vote of confidence in the town.

What emerges from an assessment of the vacancy rates is that the majority of vacancies (approximately 40% of the total) are concentrated within the Brooks Shopping Centre, the remainder are distributed relatively equally between the Primary and Secondary Shopping Areas. The vacancy rate for the town centre as a whole is inflated by a concentration of vacancies in the Brooks Centre which despite Bhs's uptake is still running at a vacancy rate of 13%.

Pedestrian Flows

Pedestrian counts by PMRS Ltd and Llewelyn Davies suggest that the focus of city centre activity has moved eastwards along the High Street inn 1991 towards Middle Brook Street/Lower High Street (between Marks & Spencer and Dorothy Perkins) in 1997. The flows also suggest that the focus seems to be gradually moving eastward towards Sainsbury and the Bus Station.

There are also areas of high activity towards the western end of the pedestrianised section outside the Debenhams Menswear branch of the department store. As would be expected, secondary shooping frontages, including Jewry Street, have seen a reduction in pedestrian conforming with the anticipated trend towards retail concentration.

Accessibility

Winchester city centre has a one way road system which operates around the shopping centre. the heart of which, the High Street, is pedestrianised. The historic street pattern does not lend itself well to car access. The City has countered this by introducing a successful park and ride system having achieved over 1,500 weekly passenger journeys in the first few weeks of operation with pre Christmas trading in 1995 reaching over 5,500 trips per week.

There are a wide range of car parks; mostly well located for the main shopping area. They are extremely popular not only with shoppers but with regular long stay customers with many of the car parks operating at or close to capacity for much of the shopping day. The principal car parks include Cheddle Street multi storey (627 spaces), Tower Street multi storey (541 spaces), the Brooks underground car park (260 spaces) and Friarsgate multi storey (367 spaces) supported by a number of smaller surface car parks providing in total some 3,200 car parking spaces with a further 330 spaces at park and ride locations. The provision of shoppers car parks should be considered in the context that over one third of all spaces are available for cheap long stay car parking and seem to be well used by employees in the City.

Stagecoach and Hampshire County Council-County Bus operate extensive services to surrounding towns and villages as well as long distance services to Oxford, Portsmouth, Southampton, Basingstoke and London. The bus station is located at the eastern end of the High Street and provides direct linkage to the Primary Shopping Area. Due to the pedestrianised form of Winchester city centre, bus routes do not pick up or set down in the main High Street, this has the effect of drawing pedestrians through the centre, between attractors and transport nodes.

The city also has the benefit of a railway station with services to Southampton, Eastleigh, Portsmouth, Basingstoke and London. The station is relatively well connected to the centre, it is approximately a five minute walk and there also numerous buses direct to the bus station which stop at the railway station.

Retailer Demand

Interest in Winchester from national retailers is currently strong; despite the fact that the centre already hosts a wide range of multiples. Recent multiple transactions in the High Street have included Salisbury's, C & G Building Society, the movement of Holland & Barratt from The Square, Car Phone Warehouse, Vision Express, Reeves the Bakers and New Look.

Retailers currently seeking prime representation in Winchester include QS Familywear, The Disney Store, Monsoon, Etam and Thornton's. A number of other retailers such as Going Places, The Crafter's Marketplace and Domino's Pizza are also considering Winchester as a trading location and are likely to consider more secondary locations such as The Brooks and the more peripheral parts of the High Street. Furthermore the extent of current refurbishment activity along the High Street indicates commitment to trading in Winchester by existing retailers.

Rental Level (K.S to provide)
Or Alsop Verril RIA

Yields On Commercial Property (K.S to provide)
Or Alsop Verril RIA

Retail Consents In Winchester.
The most significant retail development in Winchester town centre in recent years is the Brooks Shopping Centre which was completed in March 1991. The Centre provides a total area of some 10,219 sq.m (110,000 sq.ft) over two levels and is estimated to have increased comparison floorspace by 33%. The Centre was originally developed by Ladbrookes to provide a considerable number of small units anchored by a small Beales Department Store. Difficulties were experienced in the first few years of letting due to the recession in consumer expenditure. The 1992 Chesterton's study estimated that 60% of the floorspace was vacant at the time. Chesterton's put the problems experienced by the Brooks Centre down to weaknesses in terms of design, absence of a strong anchor trader and poor pedestrian linkage with the High Street (Hampshire County Structure Plan (Review) Retail Analysis, 4.16)

This has been recently addressed by Ladbrokes redevelopment of part of the centre to provide a new store for Bhs extending to 3,716 sq.m (40,000 sq.ft) which opened in Autumn 1996. Despite this major letting the centre remains secondary, although is beginning to benefit from the increased activity generated by the new Bhs. Now 17 units remain vacant, which account for approximately 13% of the centres floorspace.

The Brooks Centre is now under new ownership and there are plans to revitalise the centre which is likely to involve the creation of new units of a size suitable for multiple retailers and of a situation suitable to attract customers in off the High Street.

Summary

Winchester seems to have survived the recent recession well and the city exhibits clear signs of retail health when measured against retail health indicators. The city possesses a reasonable mix of uses and a good range of national multiple retailers are represented which could be further stregthend with the provision of a number of larger units.

With demand for premises in the city centre growing vacancies are low in both the Primary and Secondary Shopping Areas. Despite higher vacany levels in the Brooks Centre there are emerging positive signs that these levels may fall with the amalgamation of small units to attract multiple retailers.

Rental levels and yields are stregthening, which also reflects growing investor and operator confidence in the city centre.

The city's unique environment and accessibility from the motorway network is likely to continue strengthening the vitality and viability of the centre as a whole. However although Winchester is attractive to tourists they tend to spend little money whilst visitng and the mainstay of the retail trade is from City residents. The trading capcity and affluence of these residents has been over emphasised in the past therefore it is necessary to put in place a retail strategy that serves the purchasing power of residents and working population in order to reverse the trend of trade diversion to other towns.