8.0 THE NEED FOR RETAIL DEVELOPMENT

Introduction

8.1 This section assesses the adequacy of existing shopping facilities within Winchester to meet the current and future needs of customers. The ability of existing facilities to meet the needs and aspirations of customers can be examined in a number of ways, for example:

- the quantity (number of outlets and level of floorspace);
- the range of facilities in terms of mix, quality and price; and
- the location and accessibility of shopping facilities.

8.2 The retail floorspace projections set out in the previous section are based on various assumptions. However, there are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- effect of recent and new retail development on existing shopping patterns;
- the effect of Internet/home shopping;
- the acceptability of higher than average trading levels;
- the opportunities for clawing back expenditure leakage; and
- the potential impact new development may have on the City Centre.

8.3 The floorspace projections shown in the previous section should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan policies or when used to guide development control decisions. The projections should be monitored and kept under review.

Food and Grocery Shopping

8.4 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a *main* shopping trip generally made once a week or less often and *top-up* shopping trips made more frequently. The household survey results confirm that most households in the study area do undertake both *main* and *top-up* trips.

8.5 Many households will also undertake bulk food shopping trips. The availability of a wide range of products and free surface level car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores (defined as over 2,323 sq m net or more (25,000 sq ft), are the usual destination for these types of shopping trip.

8.6 The capacity projections in the previous section suggest that there is quantitative scope for convenience retail development within Winchester. The potential level of surplus expenditure at 2011 is estimated to be £29.50 million, without the MDA and £37.84 million with the MDA. This surplus could support between 3,000 to 3,800 sq m net of new food store floorspace.

8.7 Residents in Winchester urban area (Zones A and B) have the choice of two large food superstore (approximately 3,500 sq m net) within Winchester i.e. Sainsbury and Tesco. These two stores are modern stores and offer a good range and choice of products and ample free surface car parking.

8.8 Winchester City Centre has a reasonable provision of convenience sales floorspace, although there are no large supermarkets offering a full range of convenience goods in one unit. The Sainsbury store is the largest food store in the City Centre, but has a sales floorspace of only 623 sq m net. This store appears to be cramped and congested at peak periods. Because of the absence of large food stores in the City Centre, households who wish to undertake bulk food shopping primarily use the larger out of centre food stores.

8.9 Nevertheless, the estimated level of expenditure retention in Winchester urban area (Zones A and B) is estimated to be high (approximately 90%). Therefore, there is no pressing need for new food store development in order to reduce expenditure leakage.

8.10 The quantitative assessment set out in Section 7 suggests that convenience businesses within Winchester are collectively trading above the expected benchmark turnover, which suggests there is some quantitative scope for further floorspace.

8.11 A food store within or at the edge of Winchester City Centre would be the sequentially preferable location for new food store development, and would be beneficial in term of:

- reducing trading congestion in City Centre food stores particularly Sainsbury;

- improving the range and choice of convenience shopping in a location accessible to households without the use of a car for shopping;

- improving the opportunities to undertake main as well as top-up food shopping in the City Centre.

8.12 However, it is unlikely that a food store of more than 2,000 sq m net could be accommodated in the City Centre. The level of surplus expenditure up to 2011 may be sufficient to support a further food store development in Winchester. This additional scope if needed could be accommodated in extensions to the existing food superstores in Winchester or in a new neighbourhood store to serve the MDA.

Comparison Shopping

8.13 Surplus comparison expenditure available to shops in Winchester is estimated to reach between £24.09 and £31.33 million by 2011, depending on the MDA. We have split this surplus expenditure into high street comparison shops and bulky goods retail warehouses. This expenditure (assuming the MDA goes ahead) could support approximately 5,400 sq m net (7,700 sq m gross) of high street comparison shops and 3,800 sq m net (4,500 sq m gross) of retail warehousing.

8.14 In the future it may be desirable to accommodate more comparison shopping facilities within the City Centre rather than retail warehouses. Therefore, the existing balance between high street shops and retail warehouses may change. However, this may depend on the ability of development sites in the City Centre to accommodate new floorspace.

8.15 Winchester City Centre provides a reasonable range of comparison shops, if not comparable with those now available in Southampton or Basingstoke. For example the number of multiple retailers within Winchester City Centre is not comparable with those available in Southampton or Basingstoke. The comparison multiple retailers in Winchester, Southampton, Basingstoke, Andover and other competing centres are listed in Appendix D. Winchester provides many of the mainstream high street fashion stores and national multiple retailers, but has a more limited provision than Southampton or Basingstoke.

8.16 Most of Winchester's fashion shops are middle priced shops, whilst Southampton has a greater range of higher quality shops. Some Winchester residents who wish to buy designer and higher value clothing currently choose to shop in Southampton, where the choice of shops is greater. The household survey results suggest that approximately half of the residents in the inner study area do a quarter or less of their for clothing and footwear shopping in Winchester. Winchester's retention of other types of comparison expenditure is also relatively low.

8.17 The quantitative assessment in Section 7 suggests that there could be scope for approximately 5,400 sq m net (7,700 sq m gross assuming a net : gross ratio of 70%) of high street comparison retail floorspace in Winchester by 2011, assuming the MDA is implemented. This theoretical scope could provide an opportunity to improve the range and quality of comparison shopping, particularly in the City Centre. New floorspace could help to attract comparison retailers not currently represented in Winchester, or allow existing retailers to occupy larger premises.

8.18 The visitor survey results suggest that more customers are dissatisfied rather than satisfied with the choice of shops within Winchester City Centre. Over 47% of visitors indicated that they dislike the choice or quality of shops in Winchester City Centre, compared with 30% who indicated they like the choice or quality of shops. The household survey results also indicated that 56% of households within the inner study area would shop more often in Winchester if shopping provision was improved. These results, and the high level of expenditure leakage from the Winchester area, suggest there is a need to improve shopping facilities in Winchester.

8.19 In our view it is necessary to identify development opportunities to meet the needs of the community.

Retail Warehouses

8.20 The retention of bulky goods shopping expenditure in Winchester is also relatively low. Residents within the Winchester have access to retail warehouses selling most bulky comparison goods, i.e. DIY, carpets and electrical goods. However, furniture retail warehouses appears to be the most obvious area of deficiency.

8.21 Retail warehouses at Winnall are relatively modern with surface car parking. The DIY store (Homebase) is a reasonable size, but does not offer the full range of goods available in larger DIY stores (over 5,000 sq m gross).

8.22 The canvas of retail operators suggests that there is occupier demand for further bulky retail warehouse operators. The quantitative assessment in Section 7 suggests that there could be scope for approximately 3,800 sq m net (4,500 sq m gross) of bulky goods retail warehousing in Winchester by 2011, assuming the MDA is implemented.

8.23 The sequential approach within PPG6 suggests that further out-of-centre retail warehouse development should not be permitted, if there are sites/premises within or at the edge of existing centres. Retail developers with out-of-centre or edge-of-centre proposals must demonstrate a clear need for their development, and must demonstrate that their proposal cannot be accommodated on a sequentially preferable site or within City Centre development opportunities.