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Planning Design Economics

**Retail and Town
Centre Uses Study
Update 2010**

Winchester City Council

October 2010

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1.0 Introduction

- 1.1 Nathaniel Lichfield and Partners (NLP) was commissioned by Winchester City Council to prepare a retail and town centre uses study in 2007. This study included:
- a an assessment of the future needs for additional retail and commercial leisure facilities within the authority area up to 2026;
 - b an analysis of the role and function of existing centres in the Winchester District;
 - c an assessment of the capacity of Winchester's centres to accommodate growth, and the identification of potential development sites; and
 - d a policy review and proposed issues and options for the Local Development Framework (LDF).
- 1.2 This report identifies recent changes and trends in retail planning and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. The report also updates the commercial leisure assessment and reviews the capacity for Winchester's centres to accommodate growth and current local plan policy.
- 1.3 This report does not update the household survey or health checks carried out in 2007 and should therefore be read alongside the 2007 retail study.
- 1.4 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 sets out the updated retail capacity and quantitative need assessment. Section 4 sets out the updated commercial leisure and other town centre uses assessment and Section 5 updates the hierarchy of centres and reassesses the town centre boundaries. Section 6 reassesses the large site allocations. Section 7 provides the recommendations and conclusions.

2.0 **Recent Changes and Trends**

The Need for the Study Update

- 2.1 The Council's previous retail and town centres study (2007) provided projections up to 2026 and these figures now need to be updated. The 2007 study did not foresee the current economic recession and the expenditure growth projections adopted in 2007 may no longer be robust.
- 2.2 Central government guidance in PPS6 has been replaced by PPS4 and this will have implications for plan making and development control decisions.

PPS4 'Planning for Sustainable Growth'

- 2.3 The 2007 study was based on the guidance set out in PPS6: Planning for Town Centres published in March 2005. This guidance has now been superseded by PPS4 'Planning for Sustainable Growth' published by published by the Department for Communities and Local Government on 29 December 2009. It sets out the Government's policies for economic development, and replaces PPG4, PPG5, PPS6 and parts of PPS7 and PPG13. As such it provides a more succinct statement of economic development policy including town centre and retail policy, in both urban and rural areas. Additional good practice guidance on need, impact and the sequential approach for retail and town centre uses is provided in the accompanying Practice Guide (PG).
- 2.4 PPS4 places retail and town centre development in its wider context, as '*economic development*' that contributes to the Government's overarching objective of "*sustainable economic growth*" and removes the 'need' test for determining planning applications.
- 2.5 PPS4 emphasises that the Government's overarching objective is sustainable growth (para. 9.). To help achieve sustainable economic growth the Government's key objectives for planning are to:
- a build prosperous communities
 - b reduce the gap in economic growth rates between regions, promoting regeneration and tackling deprivation
 - c deliver more sustainable patterns of development
 - d promote vitality and viability of town and other centres as important places for communities
 - e raise the quality of life and the environment in rural areas (para. 10.)
- 2.6 PPS4 excludes any specific proposals for a 'competition test'. The Government response to the final Competition Commission recommendations will be issued separately.

- 2.7 There are a number of changes in the wording of policies which clarify the Government's approach and support for town centres, as summarised below.

Plan Making Policies

- 2.8 As in PPS6 there is considerable emphasis on the plan led approach and the need to base regional and local policies on a robust evidence base. PPS4 clearly sets out what is required of planning authorities.
- 2.9 The 'need' assessment remains part of the required inputs for plan making, and specifically qualitative need requires a consideration of the provision and distribution of services, and whether there is a need to increase competition and retail mix. Local planning authorities are required to:
- 1 identify deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs;
 - 2 give additional weight to qualitative deficiencies in deprived areas. This could include promoting centres to a higher level of the retail hierarchy or designating new centres, where appropriate. However, the needs of deprived areas should only be given preference when considered against alternative sites with similar location characteristics, and any benefits in respect of regeneration or employment, should only be material considerations in the site selection process;
 - 3 set flexible policies for their centres to respond to changing economic circumstances;
 - 4 encourage residential or office uses above ground floor town centre uses within centres, ensuring housing in out-of-centre developments is not, in itself, used to justify additional floorspace in such locations;
 - 5 consider setting thresholds for the scale of edge-of-centre and out-of-centre development which should be the subject of an impact assessment and specify the areas where this will apply;
 - 6 plan to promote competitive town centres and provide consumer choice and ensure a diverse range of uses are provided throughout a centre;
 - 7 ensure that the scale of any sites identified for development and the level of travel they generate, is in keeping with the role and function of that centre;
 - 8 support shops and services in local centres and villages; and
 - 9 identify sites in, or failing that, on the edge-of-centre, capable of accommodating larger format developments where there is a need for such development.

Development Management Policies

- 2.10 Applications for retail and town centre uses will be assessed against PPS4 policies and the key sequential and impact tests. The latter will consist of two sets of assessments, one applying to all forms of economic development, and

the other specifically applying to town centre uses. The policy also allows for local authorities to define any locally important impacts on centres which should be tested.

- 2.11 The requirement is to focus on the impacts during the first five years after implementation of a proposal. This includes consideration of the cumulative impact of the development with recent permissions and developments. PPS4 also requires the assessment to be proportionate to the scale of development proposed and encourages local planning authorities to discuss and agree the type and level of information required within an impact assessment before submission.
- 2.12 In terms of the sequential approach, the policy requirements are largely unchanged, with sites required to be assessed for their availability, suitability and viability. However PPS4 makes it clear that where an applicant has not demonstrated compliance with the sequential approach, then planning applications for main town centre uses that are not in an existing centre and not in accordance with an up to date development plan, should be refused.
- 2.13 Similarly if a proposal is likely to lead to a significant adverse impact, whether on its own or cumulatively, it should also be refused. Where there is no significant adverse impact the local planning authority is required to determine an application taking account of the positive and negative impacts of the proposal and any other material considerations.

Rural Policy

- 2.14 A specific policy for town centre uses in rural areas is provided. This expands the consideration given to the importance of a facility that would be lost or see a change of use, to include a consideration of the economic base of the area, as well as the importance of the facility itself. It also advises that applications for developments which fail to protect existing facilities which provide for people's day-to-day needs should be refused.

Development Plan

- 2.15 The development plan consists of the saved policies of the Winchester District Plan Review (adopted July 2006). The South East Plan (May 2009) was formally revoked on 6 July 2010 and no longer forms part of the development plan and since May 2009, no provisions or policies within the Hampshire Structure Plan 1996-2011 (Dec 2000) are in force.
- 2.16 As the South East Plan no longer applies, the progress of the Core Strategy has been delayed.

The Economic Downturn

- 2.17 The economic downturn is having a significant impact on the retail and leisure sectors. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Woolworths, MFI, Land of Leather, Borders and

Zawi). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

- 2.18 The most recent Government expenditure data available (2008) only partially reflects this downturn. Projecting expenditure levels within this study update does not assume a continuation of recent past trends (i.e. significant expenditure growth), particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

- 2.19 A revised assessment of the need for retail facilities in Winchester is set out in Section 3.0 of this report. This section provides an overview of national trends within the retail sector.

Expenditure Growth

- 2.20 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.
- 2.21 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990's. The economic downturn suggests that recent rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Hampshire.

New Forms of Retailing

- 2.22 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Hampshire. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Winchester District.
- 2.23 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant

percentage of total retail expenditure (Experian Briefing Note 6.1). Recent trends suggest continued strong growth in this sector, from 5.5% of expenditure in 2004 to 10.1% in 2009 (Experian Briefing Note 6.1), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian has recognised the potential impact of retailing on the high street and has provided future projections. Experian's Retail Planning Note 2.3D (Dec 2005) (page 1) states:

"The current scale and scope for the expansion of the selling of retail goods over the internet (e-tailing) has increasingly become an issue in retail planning... A major uncertainty, however, concerns projected growth rates... goods sold over the internet may still come from conventional retail outlets (i.e. sales made over the internet may still be taken from shelves of normal shops), so there is an additional uncertainty over e-tailing's precise impact on current and future space requirements."

- 2.24 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.
- 2.25 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods. Nationally growth in on-line food and grocery sales has increased from 1.6% in 2004 to 6.4% in 2009, and it is expected to increase to 7.6% in 2013 and stabilise thereafter (Experian Briefing Note 6.1).
- 2.26 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large 'category killer' retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.
- 2.27 Other traditional high street retailers have sought out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.

- 2.28 The economic downturn has had, and is likely to continue to have, an impact on the retail sector, e.g. Woolworth, Borders and MFI are notable victims. The effects of the recession may have an impact on shop vacancy levels in the District. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.
- 2.29 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in Winchester District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.
- 2.30 Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Winchester, Southampton, Basingstoke and Portsmouth. Demand from multiples within the District's town centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

3.0 **Quantitative Scope for Retail Floorspace**

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Winchester District up to 2026. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary vales expressed in this analysis are at 2008 prices unless stated otherwise. The previous 2007 NLP study was based on 2005 prices, therefore the expenditure and turnover figures in this report are not directly comparable with the figures in the 2007 study.

3.3 The 2007 study provided projections from 2007 to 2011, 2016, 2021 and 2026. The projections in this report have been rolled forward and figures are provided for 2013, 2016, 2021 and 2026.

Methodology and Data

3.4 The quantitative analysis is based on the study area defined for the main centres in the 2007 NLP Study. The study area has been divided into nine zones for more detailed analysis. The study area used within this update replicates the area adopted in the 2007 Study.

3.5 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of major competing shopping destinations i.e. shopping facilities within the study area are expected to attract a significant proportion of their trade from residents within the study area.

3.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area zones have been obtained.

3.7 Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2008 to 2011). These forecasts show limited growth due to the effects of the recession. Experian's projections are based on an economic model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and values. The model incorporates assumptions about income and price elasticities.

3.8 For longer term projections Experian's ultra long term growth rate has been adopted (i.e. 0.5% for convenience goods and 4.7% for comparison) to project between 2011 and 2026. We believe the Experian lower EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the shorter term. In the longer term it is more difficult to forecast year on

year changes in expenditure, and in our view, past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

- 3.9 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors, but primarily information gathered within the household survey undertaken in 2007, with amendments to reflect changes since 2007.
- 3.10 The total turnover of identified shops within Winchester District is estimated based on penetration rates. The turnover estimate for convenience floorspace is then compared to average benchmark or average sales floorspace densities derived from Verdict Information 2009, which provides an indication of how food stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail floorspace.

Population and Spending

- 3.11 The study area population for 2010 to 2026 is set out in Table 1B in Appendix B, based on the 2001 Census and Hampshire County projections (April 2009) up to 2026. The last five rows of Table 1B also assume separate scenarios for additional major residential development at Hedge End and Fareham Strategic Development Areas (SDA's), in North of Whiteley, Barton Farm or West Waterlooville.
- 3.12 Table 2B in Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 1C in Appendix C.
- 3.13 The level of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.14 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of Trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.
- 3.15 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.8% and 7.7% of total convenience and

comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.8% and 8.9% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

3.16 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 16.4% from £408.97 million in 2010 to £476.13 million in 2026, as shown in Table 3B in Appendix B.

3.17 Comparison goods spending is forecast to more than double between 2010 and 2026, increasing from £633.13 million to £1,371.22 million, as shown in Table 2C in Appendix C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

3.18 Existing convenience goods retail sales floorspace within the Winchester District is 20,071 sq m net as set out in Table 1A in Appendix A. Most of this floorspace is concentrated in Winchester urban area. This floorspace figures excludes comparison sales floorspace within food stores (4,013 sq m net).

3.19 Comparison goods retail sales floorspace within the Winchester local authority are, including retail warehouses is estimated as 59,784 sq m net as shown in Table 3A to 5A in Appendix A, which includes comparison sales within food stores.

Existing Spending Patterns 2010

Convenience Shopping

3.20 The results of the household shopper questionnaire survey, undertaken by NEMS in June 2007 have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B in Appendix B.

3.21 Table 5B indicates that the level of convenience goods expenditure attracted to shops/stores in the Winchester District in 2010 is estimated to be £210.25 million as shown in Appendix B. Winchester LA's market share of total convenience expenditure in the study area as a whole is estimated to be about 45% (£185.6 million of £408.97 million).

3.22 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A in Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food

store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

- 3.23 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix A, for consistency with the use of goods based expenditure figures.
- 3.24 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,000 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Winchester District is £182.07 million at 2010.
- 3.25 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Winchester District in 2010 is £210.25 million. These figures suggest that collectively convenience retail facilities in Winchester District is trading slightly above average. The identified available expenditure is 15% (or +£28.2 million) above benchmark levels.

Comparison Shopping

- 3.26 The estimated comparison goods expenditure available within the study area is £633.13 million in 2010, as shown in Table 3C in Appendix C. This is expected to increase to £1,371.22 million in 2026.
- 3.27 Winchester District's market share of total comparison goods expenditure generated within the study area is about 31%. Therefore 69% of comparison expenditure is spent elsewhere, in particular Southampton, Andover, Eastleigh, Fareham and Waterlooville. However, the retention rate within the core Winchester (Zones 1 to 4) is much higher at about 61%.
- 3.28 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly. Within Winchester urban area available company average sales densities (per sq m or per unit) from Mintel's Retail Rankings 2010 have been used to calculate an expected turnover for existing facilities, as shown in Tables 3A and 5A. For other shopping centres (Table 4A) outside Winchester urban area, we have adopted an average sales density of £4,000 per sq m net.
- 3.29 The current level of comparison expenditure attracted to facilities in Winchester District is £244.82 million. Facilities within Winchester urban area are estimated to be trading about 2% above benchmark, whilst comparison shops in the rural parts of Winchester are estimated to be trading about 33% above benchmark levels. This implies rural areas are achieving a sales density much higher than £4,000 per sq m net. Whiteley is estimated to be trading £18.08 million below the benchmark turnover (£41.71 million based on a sales density of £4,000 per sq m net).

- 3.30 On balance comparison shopping facilities within the Winchester District appear to be trading healthily.

Quantitative Capacity for Convenience Floorspace

- 3.31 The level of available convenience goods expenditure in 2013, 2016, 2021 and 2026 is shown at Tables 4C to 7C in Appendix C.
- 3.32 The total level of available convenience goods expenditure available for shops in Winchester District between 2010 and 2026 is summarised in Table 10B. This table takes into account the population and expenditure projections shown in Table 1B to 3B in Appendix B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.33 Table 10B assumes that the benchmark turnover of convenience floorspace will not increase during 2010 to 2011 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 0.3% per annum is adopted, which we believe is realistic if an expenditure growth rate of 0.5% per annum is achieved.
- 3.34 The estimates of surplus expenditure are converted into floorspace projections in Table 10B, Appendix B. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. Table 10B assumes different benchmark turnover densities for Winchester urban and rural areas and Whiteley based on the existing benchmark sales densities shown in Table 1A. The projections assume that a mix of different types of floorspace would be provided i.e. large food superstores, smaller supermarkets and small shops. These projections are over and above commitments as set out in Table 2A in Appendix A.
- 3.35 Population and expenditure growth will result in a baseline convenience expenditure surplus at 2016 of £29.43 million increasing to £43.05 million in 2026. Surplus convenience expenditure has been converted into convenience floorspace projections at the foot of Table 10B in Appendix B. These floorspace figures are over and above commitments, i.e. Aldi, Weeke (at 2013) and Silver Hill development (at 2016) (Table 2A, Appendix A).
- 3.36 Surplus expenditure at 2016 could support 3,417 sq m net of convenience sales floorspace, or 4,201 sq m net by 2021, and 4,686 sq m net by 2026 as shown in Table 10B.

Quantitative Capacity for Comparison Floorspace

- 3.37 The assessment of existing shopping patterns in 2010 indicates that there is a high level of comparison expenditure leakage from the southern half of the study area. One would expect comparison expenditure outflow to continue to large centres including Basingstoke, Portsmouth and Southampton. Eastleigh, Fareham and Waterlooville will also attract trade from the study area.

- 3.38 Further improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from parts of the study area. The strategy for Winchester District should be to seek to increase market shares and reduce expenditure leakage.
- 3.39 We have projected the level of comparison goods expenditure available to shops in Winchester District at 2013, 2016, 2021 and 2026 as shown in Tables 4C to 7C in Appendix C. The market shares have been adjusted from 2013 to take account of the redevelopment of Whiteley. The level of comparison expenditure attracted to facilities in Winchester local authority area is expected to increase from £244.82 million in 2010 to £600.87 million in 2026.
- 3.40 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 8C. Table 8C assumes that the existing turnover of comparison floorspace will not increase during 2010 to 2011 due to the recession, limited projected expenditure growth and the existing satisfactory turnover densities. In the longer term existing floorspace within the Borough is expected to increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.7% per annum is achieved. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.
- 3.41 The growth in comparison goods expenditure available for shops in Winchester District between 2010 and 2026 is summarised in Table 8C, in Appendix C.
- 3.42 Population and expenditure growth will result in a baseline comparison expenditure surplus at 2016 of £36.23 million increasing to £197.93 million in 2026. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 8C in Appendix C. These floorspace figures are over and above commitments, i.e. Whiteley redevelopment (at 2013) and Silver Hill development (at 2016) (Table 6A, Appendix A).
- 3.43 Surplus expenditure at 2016 could support 7,438 sq m net of comparison sales floorspace, or 19,293 sq m net by 2021, and 31,840 sq m net by 2026 as shown in Table 8C.

Major Residential Development – Sensitivity Analysis

Strategic Development Areas

- 3.44 The baseline retail floorspace projections above are based on Hampshire County Council's population projections with a deduction made for Fareham and Hedge End Strategic Development Areas (SDAs).

- 3.45 The SDAs have been removed from the baseline analysis as it is possible that over the plan period they may not come forward, or may be delayed or reduced in size. In any event, the SDAs fall mainly outside the study area so the 'with SDA' scenario only accounts for part of the total amount of the SDA proposals. To assess the implications if the SDAs do come forward in their current form, we have undertaken a development scenario which takes account of the increase in population within the study area as a result of the SDAs at Fareham and Hedge End. The increase in population has been derived assuming that the population will increase at a proportionate rate to the increase in dwelling, which are as follows:
- a Hedge End SDA – total of 6,000 dwellings – scenario assumes 2,000 additional dwellings within the Study Area (166 by 2016, 866 by 2021 and 2,000 by 2026); and
 - b Fareham SDA – total of 10,000 dwellings – scenario assumes 1,000 additional dwellings within the Study Area (100 by 2016, 500 by 2021 and 1,000 by 2026).
- 3.46 The implications of the SDAs have been tested and the convenience and comparison floorspace projections are shown in Table 11B in Appendix B and Table 9C in Appendix C.

Other Development Scenarios

- 3.47 The projections do not take into account proposals for other major additional residential development in the study area. Three further development scenarios have therefore been tested, as follows:
- 1 3,000 dwellings North of Whiteley;
 - 2 2,000 dwellings at Barton Farm; and
 - 3 1,000 dwellings West of Waterlooville reserve site.
- 3.48 All three scenarios take into account the increase in population as a result of the SDAs, as outlined above. The implications of these potential development scenarios have been tested, and we have assumed the proposed residential units will be completed during the period up to 2026.
- 3.49 As a sensitivity analysis, the convenience and comparison floorspace projections for each of these development scenarios are shown in Table 12B Appendix B for convenience floorspace and Table 10C Appendix C for comparison sales floorspace.
- 3.50 The difference between the baseline projections, the SDAs scenario and the three development scenarios are relatively insignificant bearing in mind the long term nature of the projections. Other unknown factors may have a greater influence on floorspace projections, such as growth in expenditure per capita or home shopping growth. Therefore the long term projections will need to be monitored and reviewed as necessary. The key issues arising from these options are as follows:

- 1 the development north of Whiteley (with SDA's) could generate demand for about 800 sq m net of convenience sales floorspace at Whiteley by 2021 or 865 sq m net by 2026;
- 2 the development north of Whiteley could increase the scope for comparison sales floorspace at Whiteley at 2016 from about 2,821 sq m net (scenario with SDAs) to 3,924 sq m net; or from 5,969 sq m net to 8,438 sq m net by 2021;
- 3 the Barton Farm development in Winchester could increase the scope for convenience sales floorspace in the Winchester Urban Area from 1,898 sq m net (with SDAs) to 2,420 sq m net by 2016 or from 2,460 sq m net to 3,435 sq m net by 2021;
- 4 the Barton Farm development in Winchester could increase the scope for comparison sales floorspace in the Winchester Urban Area at 2016 from about 3,086 sq m net (with SDAs) to 4,280 sq m net, or from 11,287 sq m net to 13,961 sq m net in 2021.
- 5 the West Waterlooville development would have a limited impact on both comparison and convenience floorspace projections within the District based on current market shares.

4.0 **The Need for Commercial Leisure and Other Town Centre Uses**

Introduction

- 4.1 This section assesses the need and potential for commercial leisure development and other main town centre uses in the Winchester District. We have considered the potential for improving the provision of a range of commercial leisure uses including cinema/multiplex, ten pin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

The Potential for Leisure and Entertainment Uses

Catchment Potential

- 4.2 In general, commercial leisure facilities will draw the main part of their trade from residents up to a 20 minutes drive time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together on large out-of-centre leisure parks.
- 4.3 Winchester District has a relatively dispersed catchment population. There are around 210,000 people within the defined study area, of which only about 63,000 are located in the core Winchester area (Zone 1, 2 and 3). Residents in the study area have good access to major leisure facilities in Basingstoke, Andover, Eastleigh, Portsmouth, Fareham and Southampton. The proximity of major leisure facilities in these surrounding Districts will limit the catchment area and potential for major leisure facilities within the towns in Winchester District.
- 4.4 To the east of the study area, residents in the Outer Rural Area – North East of the study area (Zone 4) have the choice of visiting leisure facilities in Winchester, Basingstoke and Alton. To the south of the study area approximately 27,000 residents live in Zone 5 (Outer Rural Area – South East), 11,000 live in Zone 6 (Denmead) and 22,000 live in Zone 7 (Wickham & Whiteley) all of which are within close proximity to Fareham, Portsmouth and Southampton. Therefore residents within these areas are more accessible to other centres rather than Winchester. Approximately 27,000 residents live in Zone 8 (Outer Rural Area – West) and 42,000 in Zone 9 (Eastleigh). These residents live within close proximity to Eastleigh, Romsey and Andover.
- 4.5 The choice of leisure facilities in surrounding areas means that Winchester CC's potential leisure related catchment population will be significantly less than the population of the study area as a whole (210,000). Our assessment of comparison shopping patterns, although not directly comparable for leisure and entertainment uses, suggests that stores/shops in the District attract only about 31% of total expenditure within the study area, which implies the

shopping catchment population of Winchester is only around 65,000, which is lower than the District population of around 114,000 (ONS 2008) people.

The Cinema Market

- 4.6 Cinema admissions in the UK declined steadily during the 1950's, 1960's and 1970's, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980's, but increased steadily after 1984. Since 1985 the principal drivers of growth in the cinema business have been investment in new cinemas and higher ticket prices. Investment in new cinemas was still continuing in 2009, but they were no longer producing growth. In 2009 there were roughly 3000 more screens than in 2003 while admissions remained more or less unchanged. Investment is therefore being directed at replacing existing cinemas and tapping into new catchment populations, which is merely offsetting a decline in existing markets.
- 4.7 Within the UK more than 70% of cinema screens are in urban areas with 100,000 or more people. On average in these large towns and cities there are 12,500 people per cinema screen but it varies widely reflecting the relative affluence or age profile of the local population.
- 4.8 Cinemagoing 19 published in April 2010 by Dodona Research reported that Britain's cinema business is proving recession proof with 3D driving revenues modestly in a volume –saturated market. However, potential growth from this source will have been reaped by the end of 2010. Cinemagoing 19 forecast that total admissions would increase by about 3% between 2008 and 2010 and then level out at 170 million admissions up to 2013. Forecasts anticipated a net addition of 60 screens in 2009, then remaining constant until 2012 where the number of screens will start to decrease. Admissions per person per annum were forecast to decrease from 2.61 in 2008 to 2.58 in 2009 but then increase again to 2.60.
- 4.9 There is only one cinema in the Winchester District, i.e. the Everyman Cinema on Southgate Street in Winchester which has two screens and 384 seats.
- 4.10 The household survey results indicate that 57% of respondents in the study area visit cinemas. The highest proportion of respondents (31%) visit The Everyman Cinema in Winchester, followed by the Odeon in Southampton (27%) and cinemas in Fareham (9%).
- 4.11 There is a good provision of multiplex cinemas further a field in Basingstoke, Southampton, Fareham and Portsmouth which will continue to draw residents of the Winchester District. Since the 2007 study (and household survey), a large 9-screen multiplex cinema operated by Vue has opened in Eastleigh town centre. This facility is likely to reduce Winchester's market share of cinema trips, particularly in zones 3, 5 and 9.
- 4.12 To assess the demand for cinema admissions within the study area, we have assumed that Winchester District could increase its existing share of cinema

trips in the study area from about 31% (as suggested by the household survey results) to 50% in the future.

- 4.13 The catchment population has been converted into a total number of cinema admissions per annum based on the average national visitation rate from 2008 to 2010 (2.60 per person). The forecast national visitation rate has been used to predict future demand. The total number of cinema admissions has been converted into an optimum number of cinema screens. The results are shown in Tables 4.1 below.

Table 4.1 Cinema Potential in Winchester District

	2010	2013	2016	2021	2026
Catchment Population	210,129	214,409	218,677	223,710	227,084
Market Retention	31%	50%	50%	50%	50%
Visits Per Annum	2.60	2.60	2.60	2.60	2.60
Total Visits Per Annum	169,364	278,732	284,280	290,823	295,209
Optimum Visits Per Screen	75,000	75,000	75,000	75,000	75,000
Screen Potential	2.3	3.7	3.8	3.9	3.9
Existing Screen	2	2	2	2	2

- 4.14 Existing provision within Winchester District is 2 screens. The analysis suggests, if an increased retention rate of 50% is assumed, there is an under provision from 2013 onwards. The analysis suggests that theoretically there could be scope for an additional small (2 screen) cinema in Winchester in the future. Elsewhere in the District the relatively small towns and limited catchment population indicate that a cinema is unlikely to be viable.

Private Health and Fitness Clubs

- 4.15 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2009 indicates healthy growth across the industry with the Fitness Industry Report stating that by March 2008, there were 5,755 combined public and private sector fitness sites across the UK. Since 2007, 41 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.
- 4.16 About 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. The household survey results suggest that 19.9% of households in the study area visit health and fitness clubs, which is higher than the national membership rate. However it should be noted that not all members of these participating households will be members of health clubs (e.g. children) therefore the membership rate is likely to be less than 19.9%.

- 4.17 Private health clubs in the UK range from small independent clubs to large operators such as Nuffield Health, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.
- 4.18 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.
- 4.19 There are a relatively small number of private health and fitness clubs in the District, including: Perins Health and Fitness, New Alresford, Revive Health Club at Winchester Hotel and Winchester Tennis Club.
- 4.20 There are no large national operators in the District. In addition to the independent private leisure/entertainment facilities there are a number sports centres operated by Winchester District Council. These include the River Park Leisure Centre on Gordon Road in Winchester which has a pool complex with a 25 metre (6 lanes) pool, junior fun pool along with a Kinetika gym, health suite, sports hall, squash courts and adventure play area. Meadowside Leisure Centre, located adjacent to the Whiteley Town Centre, has a three badminton court sized multi purpose hall, a fitness suite, football, cricket pitch and tennis courts. The Winchester Sport Stadium also provides an 8 lane athletics track and all weather turf pitch.
- 4.21 The 2007 household survey indicates that 29% of respondents or their families visit a health/fitness club. Of these, just over 30% did so at destinations within the District.
- 4.22 The study area population is approximately 210,000 in 2010, which could generate demand for about 25,200 public and private membership places, based on the national average membership rate (12%). Winchester's two main private clubs and two public sports halls, assuming an average membership of at least 500, could accommodate 2,000 members, which would imply an under-provision. These figures suggest there could be scope to improve health and fitness facilities within the District.

Tenpin Bowling

- 4.23 Tenpin bowling grew quickly in the UK in the 1960s. However, the complex scoring system, lack of investment and deterioration exacerbated a significant decline in the 1970s. However, a resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. The tenpin bowling sector experienced steady growth, 13% real growth between 1997 and 2002. Mintel predicted the value of the tenpin bowling market would increase from £245 million in 2002 to £324 million by 2007.

- 4.24 There were 269 tenpin bowling centres (5,005 lanes) in the UK in 2007, approximately one lane per 12,000 people. Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.
- 4.25 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.
- 4.26 Winchester District has no tenpin bowling facility. The 2007 household survey indicates that residents who visit bowling facilities in the study area mainly go to Southampton, Basingstoke and Fareham. Residents to the south of the study area have good access to Tenpin Bowling in Southampton, Bowlplex in Portsmouth and AMF Bowling in Eastleigh, which has been built since the 2007 household survey. Residents to the north of the study area have good access to Bowlplex on Basingstoke Leisure Park.
- 4.27 The household survey results suggest that about 19.5% of households in the study area visit tenpin bowling facilities. The study area population (210,129) is in theory capable of supporting 21 lanes based on one lane per 10,000 people. If Winchester attracted 50% of tenpin bowling trips in the study area then around 10 lanes would be required. However most modern facilities tend to have at least 20 lanes, and the existing provision, including the Bowlplex at Eastleigh attract a significant proportion of trips within the study area.

Bingo

- 4.28 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. The decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.
- 4.29 The UK had 676 commercial bingo clubs in 2005, but in March 2008 this had decreased to 616 commercial bingo clubs, approximately one club per 100,000 people. The amount staked on bingo had continued to rise in previous years but peaked in 2006 at £1,826 million and fell to £1,620 million in 2008.
- 4.30 Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult each year. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. Mintel forecasts that admissions will decline from 79 million in 2005 to 68 million in 2010, although the average spend per head will increase from £26.90 to £38.40.
- 4.31 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises

(i.e. converted cinemas), into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

4.32 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL).

4.33 There are no national bingo operators in Winchester. The 2007 household survey results indicated that only 3.8% of households in the study area visit bingo facilities, of which 23.7% visited bingo facilities in Eastleigh (Leo Leisure Bingo and Angel Leisure and Bingo) and 18.7% facilities in Southampton (New Century Bingo, Gala Bingo and Mecca). The study area population (about 210,000 adults) could generate over 367,000 admissions based on the national participation rate (1.75 per adult), compared with the average of 113,000 admissions per club. These figures suggest that the study area could accommodate three to four bingo clubs. However, the provision of bingo facilities in other towns will limit potential in Winchester.

Nightclubs

4.34 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

4.35 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

4.36 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There is only one nightclub in the District, The Original Porterhouse in Winchester.

4.37 The 2007 household survey results indicated that only 9.4% of households in the study area visit nightclubs or late night music venues and that 18% of these households last visit to a nightclub/live music venue was in the District, with 8% visiting The Original Porterhouse in Winchester. About 40% last visited a nightclub or live music venue in Southampton and 22.3% visited Portsmouth. The provision of nightclubs in Southampton and Portsmouth will limit the potential for major new nightclubs in the District.

Casinos

4.38 Due to the changing nature of the casino market, with its proposed deregulation across the county, there is uncertainty to where casinos will be located in the future. Prior to deregulation operators could only obtain licences for casinos in specifically defined areas. In February 2008 an order was laid

before Parliament to allow 16 local authorities, to license casinos, but the Government stated that regional casino licences would not be allowed at this stage.

- 4.39 Operators now have to think in more detail about the catchment area of their casinos and the level of existing or future competition in a given area. Key catchment areas will have to be in or within the near vicinity of a large centre, such as a major town or city, with a drive time catchment area of approximately 30-40 minutes and as close to the centre of the catchment area as possible, with good transport links. The proximity of other established commercial uses will also be a key factor for operators when looking at locations for casinos.
- 4.40 There were 144 licensed casinos operating in Great Britain at March 2008, about one casino per 400,000 people. Attendance at casinos by members and guests increased by 6.6% from the previous year to over 16 million trips.
- 4.41 There are no casinos within Winchester District. The main centres within the local authority are unlikely to have a catchment population large enough to support a casino. It is also likely that casino operators would prefer to locate in the surrounding larger towns of London, Portsmouth and Southampton.

Bars and Restaurants

- 4.42 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3/A4/A5 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa coffee and Coffee Republic.
- 4.43 National branded pub/restaurant chains have been investing heavily, although not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities.
- 4.44 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 4.2. The proportion of Class A1 retail uses in Goad town centres has decreased by 17.5% between 1994 to 2010 (9.1 percentage points), whilst non-retail uses including Class A2, A3 and non-retail (service) A1 uses have all increased.

Table 4.2 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1994 to 2010	Proportion of Total Number of Units (%)			
		1994	2000	2005	2010
Class A1 (Retail)	- 17.5	61.2	59.1	56.4	52.1
Class A1 (Services)	+ 50.7	6.9	8.2	9.6	10.4
Class A2	+ 1.2	8.5	8.9	8.9	8.6
Class A3/A5*	+ 65.2	9.2	11.2	13.7	15.2
Miscellaneous	+ 20.0	1.0	1.4	1.4	1.2
Vacant/under Const.	- 5.6	13.2	11.2	10.1	12.5
Total	-	100.0	100.0	100.0	100.0

Source: Goad Centre Reports

*excludes Bars/Public houses (A4)

- 4.45 However the number of bars and pubs has continued to decline in recent years according to figures produced by the Department of Culture, Media and Sport.
- 4.46 The Beer Orders were acts passed by the government in the early 1990s which saw a massive expansion of themed bar operators and pub restaurants, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.
- 4.47 Themed restaurants also expanded rapidly in the 1990s. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares.
- 4.48 Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.
- 4.49 Town centre developments are likely to include an element of Class A3 to A5 uses.

Theatres

- 4.50 The 2007 household survey indicated that 56% of respondents in the study area visit theatres. Southampton was the main theatre destination last visited for households within the study area (45%) followed by the Theatre Royal in Winchester (18%). There are two theatres in the District, the Theatre Royal on Jewry Street and the Chesil Theatre on Chesil Street, both in Winchester. However no respondents indicated that they visited the Chesil Theatre on their last trip.

- 4.51 Taking account of the amount of respondents in the study area who indicated they visit theatres there may be a requirement for a further small theatre in the District, however, current provision in the surrounding authorities means that there is not a requirement for a larger theatre.

Conclusions on Leisure and Other Town Centre Uses

- 4.52 The Winchester District has limited selection of commercial leisure, entertainment and cultural facilities, but this reflects the relatively small catchment population of Winchester itself (about 60,000). Residents in the District have relatively good access to leisure and entertainment facilities outside the local authority particularly in and around Portsmouth, Southampton, Basingstoke and Eastleigh. The local authority's location within the catchment area of larger centres will limit the potential for commercial leisure and entertainment facilities.
- 4.53 There appears to be scope for additional health and fitness facilities and there could be theoretical scope for a small (2-screen) cinema in Winchester in the long term (2016 or later). There could also be scope for a bingo club.
- 4.54 Future town centre development should provide additional space for these uses as well as Class A1 retail. As an average mixed use town centre development schemes could include at least 10% for Class A3 to A5 uses.

5.0 **Scope for Accommodating Growth**

Floorspace Projections

5.1 The floorspace projections set out in the previous sections assume that new shopping facilities within Winchester District can maintain and improve their current market share of expenditure within the study area, following the implementation of proposed commitments. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- 1 major retail developments in competing centres, such as Southampton, Andover and Portsmouth;
- 2 the re-occupation of vacant town centre floorspace;
- 3 the reliability of long term expenditure projections, particularly after 2021;
- 4 the effect of Internet/home shopping on the demand for retail property;
- 5 the acceptability of higher than average trading levels;
- 6 the level of operator demand for floorspace in Winchester District, bearing in mind the proximity of larger centres (e.g. Southampton);
- 7 the likelihood that Winchester's existing market share of expenditure will change in the future;
- 8 the potential impact new development may have on existing centres.

5.2 The long term floorspace projections (i.e. 2021 and beyond) shown in Section 3.0 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 control 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.

5.3 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. However, 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. Therefore, Internet sales will not always significantly 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.

5.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for

new retail development within Winchester District, over and above existing commitments in the up to 2021. This section examines the opportunities for accommodating this projected growth and assesses potential opportunities to accommodate this floorspace.

Accommodating Future Growth

- 5.5 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed.
- a What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
 - b Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Winchester authority area?
 - c Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
 - d 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?
- 5.6 All development should be appropriate in terms of scale and nature to the centre in which it is located.
- 5.7 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace after 2011, and 0.3% per annum for convenience floorspace. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 5.8 There were 26 vacant shop units within Winchester town centre, a vacancy rate of about 8.7%, which is below the Goad national average at December 2009 (12.45%). These vacant premises could also help to accommodate growth, e.g. if the current vacancy rate fell from 8.7% to 5% (i.e. the reoccupation of 11 vacant properties) could accommodate at least 800 sq m gross of retail space (about 80 sq m gross per unit).

Potential Development Opportunities

- 5.9 We have reviewed the potential development sites identified in the five main centres in the District within the 2007 study. Sites in each centre have been re-evaluated, in terms of their implications on the scope and need for additional retail and leisure facilities in the District.

Winchester Town Centre

- 5.10 Within and around Winchester town centre 14 potential development opportunities were identified of which 9 sites have reasonable to good potential to deliver additional retail/leisure floorspace. Some of these sites are outside the town centre boundary and could be considered to be edge or out-of-centre sites in sequential terms for retail development, e.g. WIN1, WIN2, WIN7 to WIN10. The nearest sites to the Primary Shopping Area are WIN4, WIN5 and WIN6.
- 5.11 The Silver Hill development and other commitments (e.g. Aldi at Weeke) are expected to accommodate growth in the short to medium term (up to 2016). The next priority should be to accommodate the need for new development in the longer term (2016 to 2021). As indicated in Section 3, the baseline projection for retail floorspace in Winchester urban area is 13,663 sq m net up to 2021 (split 2,455 sq m net for convenience retail and 11,208 sq m net for comparison retail as identified in Appendix B, Table 10B and Appendix C, Table 8C), or around 19,519 sq m gross, based on a 70% net to gross ratio. It may also be reasonable to expect a further 15% floorspace to be devoted to other non-retail Class A uses (Classes A2 to A5), which would produce total Class A floorspace projection of about 22,447 sq m gross by 2021.
- 5.12 Short to medium term opportunities within the Winchester town centre boundary, with an overall development rating of “reasonable” to “good” (seven sites – WIN3, WIN5, WIN6, WIN11 to WIN14), are in theory capable of accommodating around 16,000 sq m gross of Class A1 to A5 floorspace, and could meet a significant proportion of the Winchester urban area projection up to 2021. The main opportunities, closest to the Primary Shopping Area, are the Cossack Lane Car Park (up to 10,000 sq m gross) and the Middle Brook Centre/Upper Brook Street Car park (3,000 sq m gross).
- 5.13 If insufficient opportunities can be brought forward within the town centre, then it may be necessary to consider sites just outside the centre boundary. In addition, if certain formats of retail use, where there is a demonstrable need, cannot be accommodated within the town centre boundary then less central sites could be considered, for example retail warehouse type uses.
- 5.14 Three opportunities just outside the town centre boundary have been identified with reasonable development potential (WIN1, WIN2 and WIN14), which could accommodate about 9,000 sq m gross of large format type retail use, and retail uses (1,500 sq m gross) associated with the railway station.

Rest of the District

- 5.15 Within the other five centres (New Alresford, Bishop’s Waltham, Wickham, Whiteley and Denmead) 10 potential development opportunities were identified, 3 in New Alresford, 3 in Bishop’s Waltham 2 in Wickham and 2 in Denmead, all of which have “reasonable” to “good” potential to deliver additional retail/leisure floorspace in the short to medium term. No potential development opportunities were identified in Whiteley.

- 5.16 The priority should be to seek to accommodate the short to medium term need for new development (up to 2016). The next priority should be to accommodate the need for new development in the longer term (2016 to 2021). The projection for retail floorspace in Winchester rural area (excluding Winchester urban area and Whiteley) as a whole is about 4,130 sq m net up to 2021 (split 1,571 sq m net for convenience retail and 2,561 sq m net for comparison retail, as identified in Appendix B, Table 10B and Appendix C, Table 8C). This can be broken down for each town/rural local shops as follows:
- Bishops Waltham - 552 sq m net convenience and 938 sq m net comparison retail floorspace.
 - Denmead - 159 sq m net convenience and 113 sq m net comparison retail floorspace.
 - New Alresford - 225 sq m net convenience and 567 sq m net comparison retail floorspace.
 - Wickham - 286 sq m net convenience and 317 sq m net comparison retail floorspace.
 - Rural Local Shops – 349 sq m net convenience and 626 sq m net comparison retail floorspace.
- 5.17 For the whole Winchester rural area this results in 5,903 sq m gross retail floorspace assuming a 70% net to gross ratio. It may also be reasonable to expect a further 15% floorspace to be devoted to other non-retail Class A uses (Classes A2 to A5), which would produce total floorspace projection of about 6,788 sq m gross by 2021. This increases to 8,556 sq m gross by 2026.
- 5.18 Short to medium term opportunities within or near the four centres are capable of accommodating up to 7,500 sq m gross of Class A1 to A5 floorspace, and could meet the 2021 projection. The theoretical floorspace capacity of opportunities in each town is relatively evenly spread as follows; 2,200 sq m gross in New Alresford, 2,000 sq m gross in Bishop's Waltham, 2,000 sq m gross in Wickham and 1,300 sq m gross in Denmead.
- 5.19 As indicated above, no potential development opportunities were identified in Whiteley due to the Whiteley Town Centre redevelopment. However, if further development opportunities do come forward, the baseline floorspace projection is about 5,698 sq m net up to 2021 (split 175 sq m net convenience retail and 5,523 sq m net for comparison retail, as identified in Appendix B, Table 10B and Appendix C, Table 8C). This results in 8,140 sq m gross retail floorspace assuming a 70% net to gross ratio. Accounting for non-retail Class A uses produces a total floorspace of about 9,361 sq m gross by 2021.

6.0 **Defining the Districts Network of Centres**

The Designation of Shopping Centres

- 6.1 PPS4 states that local planning authorities should, as part of their economic vision for their area, set out a strategy for the management and growth of centres over the plan period (policy EC3.1). As part of their strategy local planning authorities should define a network (the pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments having:
- i made choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary, taking into account the need to avoid an over concentration of growth in centres. Identified deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy or designating new centres where necessary, giving priority to deprived areas which are experiencing significant levels of multiple deprivation where there is a need for better access to services, facilities and employment by socially excluded groups
 - ii ensured any extensions to centres are carefully integrated with the existing centre in terms of design including the need to allow easy pedestrian access
 - iii where existing centres are in decline, considered the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment
 - iv where reversing decline in existing centres is not possible, considered reclassifying the centre at a lower level within the hierarchy of centres, reflecting this revised status in the policies applied to the area. This may include allowing retail units to change to other uses, whilst aiming, wherever possible, to retain opportunities for vital local services
 - v ensured that the need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.
- 6.2 In terms of the sequential approach, PPS4 indicates that the first preference for new developments should be within centres followed by edge-of-centre sites. Out of centre sites are last in the order of preference (Policy EC5.2).
- 6.3 The distinction between town, district and local/village centres is important when applying the sequential approach. The nature, role and location of proposed retail/leisure schemes need to be considered when applying the

sequential approach. Future development plan policies in Winchester must clearly define which centres are town, district or local centres within the context of PPS4, in order to avoid confusion when applying the sequential approach.

6.4 Annex B of PPS4 provides guidance on the definition of centres. It suggests that city centres are the highest level of centre and will often be a regional centre and will serve a wide catchment. Town centres are usually the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns or other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the futures of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

6.5 PPS4 suggests that district centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Below district centres, PPS4 identifies local centres. It states that local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of PPS4.

6.6 The current Local Plan defines Winchester as the "Main Town Centre". However the definition for other centres is vague. Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham are listed as "Other Town/Village Centres". However, it is not clear which are town or village centres. In policy terms no distinction is made between other town and village centres. Saved policy SF.1 also refers to district and local centres, but these centres are not identified within the plan and are presumably smaller centres located throughout the District. In our view the shopping hierarchy as outlined in the Local Plan is confusing and needs to be reviewed.

6.7 Based on the hierarchy of centres in PPS4 a summary of recommended definitions is set out in Table 6.1.

Table 6.1 Hierarchy of Centres

Centre Classification	Definition/Comment
Town Centres	Their attractiveness for retailing is derived from a mix of comparison and convenience shopping. Will include the principal centres within a local authorities area.
District Centres	As described in Annex B of PPS4. The primary role of these centres will be the provision of convenience shopping, services but with some comparison shopping serving a relatively localised catchment area or shopping of a specialist nature.
Local Centres	As described in Annex B of PPS4 reasonably large centres of more than purely neighbourhood significance should be designated local centres.
Local Parades	All other small local shopping parades should be designated as neighbourhood parades

- 6.8 A key issue is whether the current “Town/Village” centres should be defined as town, district or local centres. In our view Bishop’s Waltham, New Alresford and Wickham best fit the PPS4 description for district centres. These centres have a reasonable number of commercial units but have a limited amount of comparison shopping facilities. If there are opportunities to significantly expand any of these centres there may be potential to upgrade the status to town centre level.
- 6.9 With regards to Whiteley, in terms of the amount of retail floorspace, it could be designated as a town centre, but it does not currently have a broad mix of uses (i.e. non-retail services) usually found within town centres, nor does it have the same level of public transport accessibility found in town centres. It currently functions as an outlet village shopping destination with a wide catchment area, with an adjacent food superstore (Tesco). The Tesco store attracts main food shopping trips. However, planning permission was granted in December 2009 for the redevelopment of the existing Whiteley Centre, providing a range of facilities including Class A2/A3/A4/A5 uses and public squares and plazas. A major part of the reason for permitting the Whiteley town centre redevelopment was to achieve a more traditional town/district centre.
- 6.10 Denmead is a much smaller centre, with about 20 commercial units and has less than half the amount of retail sales floorspace when compared with Bishop’s Waltham, New Alresford and Wickham. Denmead could be designated as a Local Centre, or alternatively it could be designated as a District Centre if the centre can be significantly expanded.

6.11

In addition to Denmead, there are other reasonably large clusters of local shops that could be designated as Local Centres. Weeke has a Waitrose, and small Co-op store supported by other shops and services. Oliver's Battery is also a reasonably large cluster of shops and services and could be designated as a Local Centre. Other small clusters of local shops/services (about 3-10 units) could be identified as Local Parades.

Table 6.2 Recommended Hierarchy of Centres

Status	Centre
Sub-Regional Town Centre	Winchester
District Centres	Bishop's Waltham New Alresford Whiteley Wickham
Local/Village Centres	Denmead Kings Worthy Oliver's Battery Stockbridge Road/Andover Road Weeke
Local parades	All other small clusters of local shops (less than 10 units – 3 or more shop units) Cheriton Colden Common Cromwell Road Droxford Hambledon Harestock Headbourne Worthy Hursley Shawford Shedfield Southwick Stanmore – Battery Hill Stanmore – Wavell Way Sutton Scotney Swanmore Twyford Waltham Chase West Meon Winnall

Scale of Development

- 6.12 Large-scale development which serves a significant part of the District should be concentrated within the five designated town/district centres. These are the largest centres and should continue to act as the principal centres within the District. Bishop's Waltham, New Alresford, Whiteley and Wickham should complement Winchester Town Centre by providing for convenience food shopping and day to day comparison shopping facilities and other services. Other shopping facilities outside these main centres should only cater for top-up and basket convenience shopping and services.
- 6.13 PPS4 suggests the impact of retail developments of 2,500 sq m gross or above may need to be considered. Based on the scale and role of centres within Winchester District and the retail floorspace projections within this report, we believe the impact of smaller development proposals could raise concerns. A development of 2,500 sq m gross could exceed or account for a significant proportion of the projected need for retail floorspace in the main towns and district centres up to 2016. The projections suggest that retail developments under 2,500 sq m gross could have a significant impact on town and district centres in the Winchester District, and the PPS4 threshold is not appropriate for local circumstances.
- 6.14 We believe the impact of all out-of-centre retail applications of 1,000 sq m gross or more should be assessed in Winchester town centre. In the district centres (Bishop's Waltham, New Alresford, Whiteley and Wickham) impact assessments should be provided for out-of-centre retail schemes of 500 sq m gross or more. If considered appropriate the Council will need to include these recommendations within the LDF.
- 6.15 The sequential approach indicates that town, district and local centres are the preferred location for new retail/leisure/cultural development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of development proposed and the catchment area the development seeks to serve.
- 6.16 In general development within the local and village centres should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a centre. Local centres within the main towns, i.e. in the urban area but outside the town centre serving that town, should primarily serve walk-in catchment areas.

Defining Centre Boundaries and Retail Frontages

6.17 PPS4 indicates that local authorities should define the extent of the centre and primary shopping area in their Adopted proposals map having considered distinguishing between realistically defined primary and secondary frontages in the designated centres and set policies that make clear which uses will be permitted in such locations (Policy EC3.1.c).

6.18 Annex B of PPS4 provides definitions of the different types of location, as follows:

Town Centre: defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.

Primary Shopping Area: defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

Primary Frontage: primary frontages are likely to include a high proportion of retail uses.

Secondary Frontage: secondary frontages provide greater opportunities for a diversity of uses.

6.19 The adopted Winchester District Local Plan sets out where new retail and leisure development should be located. Saved policy SF.1 states that retail and leisure development will be permitted within town and village centres (namely Winchester, Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham) as defined on the proposals map. This policy implies that any retail/leisure development within the centre boundaries will not be required to demonstrate need and the sequential approach.

6.20 The Local Plan defines a Primary Shopping Areas (PSA) in each centre. The PSAs do not include all of the retail frontages within the centres and represent a small part of the overall centre boundary. The PSA are not linked to saved policy SF.1, and their purpose is set out in saved policy SF.5, which seeks to protect against the loss of Class A1 retail floorspace, but SF.2 protects ground floor commercial uses (e.g. Use Class A and B) to non-commercial uses such as residential. The Local Plan appears to offer no other protection against the loss of Class A uses within centres, outside the PSA.

6.21 In our view the PSA as defined in the Local Plan is inconsistent with the definition of PSAs within PPS4. The Local Plan PSAs are consistent with PPS4's definition of Primary Shopping Frontages. It should be noted that PPS4

suggests the Primary Shopping Area should generally include the Primary Shopping Frontages and those Secondary Shopping Frontages that are contiguous and closely related to the Primary Shopping Frontages. Therefore Winchester's PSA's are too small to be consistent with the PPS4 definition, and this inconsistency could cause confusion in terms of interpretation of the sequential approach.

- 6.22 PPS4 suggests that for smaller centres, the town centre may not extend beyond the primary shopping area. This would not be appropriate in Winchester town centre. In addition, in some of the smaller centres the centre boundary has been cast relatively wide to include non-commercial uses and/or car parks (i.e. Bishop's Waltham, Denmead, New Alresford and Whiteley.
- 6.23 Recommendations relating to centre boundaries, the PSA and frontage policies are set out in Section 7 of this report.

7.0 **Conclusions and Recommendations**

- 7.1 This report provides an update of the retail capacity assessment district wide needs assessment for retail and commercial leisure uses in Winchester District and should be read alongside the 2007 Study. The principal conclusions of the analysis contained within this study are summarised below

Meeting Shopping Needs in Winchester

- 7.2 PPS4 indicates that local planning authorities should assess the need for additional floorspace over the plan period, and for five year periods within it. When planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents; although for large town centre schemes a longer period may be appropriate to allow for site assembly.
- 7.3 Meeting the projections between 2010 and 2016 remains the priority. Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out-of-centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.
- 7.4 Long term forecasts up to 2021 and 2026 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from past growth projections, as well as population growth. 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. The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Winchester.

Retail Floorspace Projections

- 7.5 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. However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores, therefore, Internet sales will not always significantly 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.
- 7.6 The quantitative and qualitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within

Winchester District. The baseline projections suggest new floorspace (over and above commitments) should be distributed as follows:

Table 7.1: Class A1 Retail Floorspace Projections (Baseline)

Location	Floorspace sq.m. net (sq. ft net)		
	Convenience	Comparison	Total
Up to 2013 (taking account of commitments)			
Winchester Urban Area	2,179	4,462	6,641
Winchester Rural Area	1,234	1,133	2,367
Whiteley	4	860	864
Total	3,417	6,455	9,872
Up to 2016 (taking account of commitments)			
Winchester Urban Area	1,900	3,065	4,965
Winchester Rural Area	1,377	1,648	3,025
Whiteley	125	2,725	2,850
Total	3,401	7,438	10,840
Up to 2021 (taking account of commitments)			
Winchester Urban Area	2,455	11,208	13,663
Winchester Rural Area	1,571	2,561	4,132
Whiteley	175	5,523	5,698
Total	4,201	19,293	23,493
Up to 2026 (taking account of commitments)			
Winchester Urban Area	2,783	19,703	22,486
Winchester Rural Area	1,686	3,522	5,208
Whiteley	216	8,614	8,830
Total	4,686	31,840	36,524

Source: Appendix B, Table 10B and Appendix C, Table 8C

*Figures are net floorspace. For consistency, when deriving the gross floorspace apply a 70% net to gross ratio

- 7.7 The baseline projections do not take account of the population increase within the study area as a result of the Fareham and Hedge End Strategic Development Areas or other major additional residential development in the study area (North of Whiteley, Barton Farm and West Waterlooville). The difference between the baseline projections, the SDA scenario and the three development scenarios are relatively insignificant bearing in mind the long term nature of the projections.

Changes Since 2007

- 7.8 The updated convenience retail floorspace projections are slightly higher throughout the period up to 2026 than the projections within the 2007 Study. However, the comparison retail floorspace projections are slightly lower than the 2007 Study.
- 7.9 The baseline convenience floorspace projections to 2016 are now marginally higher (3,401 sq m net compared with 2,569 sq m net). This increase is due to a number of factors including an increase in convenience retail expenditure per capita figures for the study area and average sales densities of food store retailers not growing at the same rate as inflation.

- 7.10 Expenditure for comparison goods is lower than previously projected due to the effects of the recession. Comparison floorspace projections to 2016 are now lower (7,438 sq m net compared with 11,268 sq m net). This decrease is due to lower forecast growth in expenditure per capita.

Commercial Leisure Development

- 7.11 The provision of leisure, entertainment and cultural facilities within the District is limited but reflects the size of its catchment and the fact that residents also have good access to facilities in neighbouring towns.
- 7.12 There is some potential to improve facilities in Winchester. The other towns in the District may only be capable of accommodating small scale commercial leisure facilities. In Winchester, commercial leisure could be accommodated within town centre development if sites are available.

Accommodating Future Growth

- 7.13 The sequential approach suggests that designated town centres should be the first choice for retail development. In considering this important issue the following factors should be assessed.
- 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 e.g. a large part of Winchester District?
 - Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- 7.14 All development should be appropriate in terms of scale and nature to the centre in which it is to be located.
- 7.15 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace after 2011, and 0.3% per annum for convenience floorspace. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 7.16 The proportion of vacant shops in Winchester town centre (8.7%) is relatively low when compared with the Goad national average (12.45%). Vacant premises are unlikely to accommodate a significant amount of growth, because all centres will have a certain level of vacant premises at any given time, and this reflects the normal churn of occupiers.

Scale of Development

- 7.17 Large-scale development which serves a significant part of the District should be concentrated within Winchester City Centre.
- 7.18 Winchester is the largest centre and should continue to act as the principal centres within the District. Centres in Bishop's Waltham, New Alresford, Whiteley and Wickham should complement Winchester by providing for main and bulk convenience food shopping and a reasonable range of comparison shopping facilities and other services. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of development proposed and the catchment area the development seeks to serve.
- 7.19 In general development within centres should primarily serve the settlement within which it is located, and smaller nearby settlements which do not have a centre. Local shops in the main settlements or villages should primarily serve walk-in catchment areas.

Centre Boundaries

- 7.20 PPS4 states that retail development should be concentrated within the primary shopping area, which will generally comprise the primary and secondary frontages. Primary frontages are likely to include a high proportion of retail uses. Secondary frontages provide greater opportunities for a diversity of uses.
- 7.21 In our view, the PSA's, as defined in the Local Plan, are inconsistent with the definition within PPS4 and are instead consistent with PPS4's definition of Primary Shopping Frontages. This inconsistency could cause confusion in terms of interpretation of the sequential approach.
- 7.22 We therefore recommend the following:
- 1 The Centre Boundaries should remain unchanged and a future replacement Policy SF.1 should indicate that leisure and main town centre uses (excluding retail) will not be required to comply with the sequential approach in this area;
 - 2 The Primary Shopping Areas should be renamed the Primary Shopping Frontages (PSF) to avoid confusion with the PPS4 definition. Within the PSF Policy SF.5 should continue to protect Class A1 uses.
 - 3 The Council should consider defining Secondary Shopping Frontages, where more flexibility will be permitted but where Class A (1 to 5) will be protected. For Winchester this could include Southgate Street, The Broadway and Jewry Street.
 - 4 Future policy should indicate that the Primary and Secondary Frontages represent the Primary Shopping Areas, where retail development will be focused. A future replacement Policy SF.1 indicates that retail uses will not be required to comply with the sequential approach in this area.

Appendix A Study Area and Existing Retail Facilities

Winchester Study Area 2010



Legend

- Zone 1 - Winchester West
- Zone 2 - Winchester East
- Zone 3 - Inner Rural Area
- Zone 4 - Outer rural Area: North East
- Zone 5 - Outer Rural Area: South East
- Zone 6 - Denmead
- Zone 7 - Wickham and Whiteley
- Zone 8 - Outer Rural Area: West
- Zone 9 - Eastleigh

0 4 8 16 Kilometers

Table 1A : Convenience Shops in Winchester (2008 Prices)

Centre/Stores	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace Sq M	Company * Average Per Sq M	Benchmark Total £M Turnover
Winchester City Centre						
Sainsbury's	1,929	623	95%	592	£10,217	£6.05
Marks & Spencer (food hall)	n/a	700	100%	700	£11,759	£8.23
Iceland	n/a	473	98%	464	£6,000	£2.78
Other small convenience shops (17)	1,410	920	70%	644	£4,000	£2.58
City Centre Sub-Total	n/a	2,716		2,399		£19.64
Winchester Urban Area						
Co-op, 61-65 Stoney Lane, Weeke	428	212	98%	208	£6,753	£1.40
Waitrose, Weeke		1,764	90%	1,588	£11,589	£18.40
One Stop, Stanmore	n/a	134	99%	133	£4,000	£0.53
Sainsbury, Badgers Farm	n/a	5,098	n/a	3,848	£10,217	£39.32
Tesco Express, Harestock	277	163	99%	161	£12,611	£2.04
Tesco Express, Kings Worthy	204	112	99%	111	£12,611	£1.40
Tesco, Winnall	n/a	5,823	n/a	3,706	£12,611	£46.74
Majestic Wine	n/a	270	100%	270	n/a	£1.61
Other small convenience shops	n/a	600	100%	600	£4,000	£2.40
Urban Area Sub-Total	n/a	14,176		10,624		£113.83
Winchester Urban Area Total	n/a	16,892		13,024	£10,248	£133.46
Bishops Waltham						
Budgens	929	539	98%	528	£4,000	£2.11
Co-op	453	186	98%	182	£6,753	£1.23
Local Shops	n/a	329	100%	329	£4,000	£1.32
Bishops Waltham Total		1,054		1,040		£4.66
Denmead						
Co-op	578	379	98%	371	£6,753	£2.51
Local Shops	n/a	92	100%	92	£4,000	£0.37
Denmead Total		471		463		£2.88
New Alresford						
Tesco Express, 12-14 Broad Street	362	208	97%	202	£12,611	£2.54
Co-op	436	300	95%	285	£6,753	£1.92
Local Shops	n/a	271	100%	271	£4,000	£1.08
New Alresford Total		779		758		£5.55
Wickham						
Co-op	466	346	98%	339	£6,753	£2.29
Local Shops	n/a	205	100%	205	£4,000	£0.82
Wickham Total		551		544		£3.11
Other Rural Local Shops	3,500	2,450	100%	2,450	£4,000	£9.80
Winchester Rural Area Total	n/a	5,305		5,255	£4,948	£26.00
Whiteley						
Tesco	3,315	1,887	95%	1,793	£12,611	£22.61
Whiteley Total		1,887		1,793	£12,611	£22.61
Winchester LA Total	n/a	24,084		20,071	£9,071	£182.07
		Comparison Floorspace in Food stores				4,013

* Turnover densities exclude an allowance for petrol sales in large food stores and include an allowance for VAT.

Sources:

Retail Rankings and Verdict 2009

Institute of Grocery Distribution

Tesco Stores

J Sainsbury

Goad Plans

Table 2A: Convenience Retail Commitments (2008 Prices)

	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace SqM	Company * Average Per Sq M	Benchmark Total £M Turnover
Gains						
Sainsbury City Centre - New Store*	2,429	1,579	90%	1,421	£10,217	£14.52
Aldi, Weeke	1,193	760	90%	684	£4,368	£2.99
Whiteley Town Centre	465	325	100%	325	£4,000	£1.30
Total Gains		2,664		2,430		£18.81
Losses						
Sainsbury, City Centre	1,929	623	95%	592	£10,217	£6.05
Iceland, City Centre	n/a	473	98%	464	£6,000	£2.78
Total Losses		1,096		1,055		£8.83
Net Increase Total	n/a	1,568		1,375		£9.98

* Thornfield Scheme 65% net:gross assumed

Sources:

Retail Rankings and Verdict 2009

Table 3A: Comparison Shops within Winchester City Centre 2010

Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Comparison Shops in Winchester Town Centre				
Argos	300	100	£20,561	£2.06
Beales	2,970	2,200	£1,619	£3.56
BHS (£M per outlet)	3,190	2,400	n/a	£4.46
Blacks (2004/05)	180	130	n/a	£0.75
Boots The Chemist (£M per outlet)	1,010	750	n/a	£2.81
Clarks	330	250	£10,930	£2.73
Clinton Cards (x2)	580	430	£3,200	£1.38
Currys Digital	230	170	£6,109	£1.04
Debenhams	4,170	3,100	£2,820	£8.74
Dolland & Aitcheson (£M per outlet)	90	50	n/a	£0.72
Early Learning Centre (2004/05)	240	180	£4,914	£0.88
Ernest Jones (£M per outlet)	120	90	n/a	£1.08
Fat Face (£M per outlet)	620	460	n/a	£0.87
Game (2007/08)	240	180	£22,930	£4.13
HMV (2007/08)	310	230	£8,626	£1.98
Jaeger (£M per outlet)	180	130	n/a	£0.67
Jessops (£M per outlet)	80	60	n/a	£1.26
JJB Sports	390	290	£2,239	£0.65
Laura Ashley	540	405	n/a	£0.35
Lloyds Pharmacy (£M per outlet) (x2)	260	195	n/a	£1.08
London Camera Exchange (£M per outlet)	50	40	n/a	£0.66
Long Tall Sally (£M per outlet)	110	80	n/a	£0.56
Marks & Spencer	1,620	1,200	£4,778	£5.73
Monsoon (£M per outlet)	320	240	n/a	£1.17
Moss Bros (£M per outlet)	240	180	n/a	£0.83
Multyork (£M per outlet)	340	250	n/a	£0.93
New Look	640	480	£3,974	£1.91
Next (2007/08)	340	250	£5,570	£1.39
O2 (£M per outlet)	120	90	n/a	£1.13
Orange (£M per outlet)	60	40	n/a	£1.18
Paperchase (£M per outlet)	140	100	n/a	£0.51
Phones 4 U (£M per outlet)	240	180	n/a	£1.76
River Island (2006/07)	420	310	£11,003	£3.41
Robert Dyas (2003/04)	300	220	£3,453	£0.76
Russell & Bromley (£M per outlet)	460	340	n/a	£2.31
Specsavers (£M per outlet)	150	100	n/a	£1.34
Stead & Simpson (2006/07)	120	90	£3,788	£0.34
Superdrug (2007/08)	470	352	£4,654	£1.64
The Body Shop (£M per outlet)	180	130	n/a	£0.59
The Carphone Warehouse (£M per outlet)	110	80	n/a	£2.33
The Edinburgh Woollen Mill (£M per outlet)	220	160	n/a	£0.66
Timpson (£M per outlet)	90	70	n/a	£0.20
Vision Express (£M per outlet)	200	150	n/a	£1.05
Vodafone (£M per outlet)	100	80	n/a	£1.08
Waterstones (2007/08) (x2)	930	700	£3,617	£2.53
WH Smith (2007/08)	1,360	1,000	£5,097	£5.10
Other Comparison shops	14,800	11,100	£5,347	£59.35
Food stores (comparison space only)	n/a	317	£5,000	£1.58
Winchester Town Centre Total	n/a	30,129	£4,754	£143.24
Winchester Urban Area - Local Centres	n/a	700	£4,000	£2.80

Sources:

Winchester Goad (June 2009)

Table 4A: Comparison Shops within Other Main and Local Centres 2010 (2008 Prices)

Location	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Bishops Waltham	800	£4,000	£3.20
Denmead	200	£4,000	£0.80
New Alresford	1,000	£4,000	£4.00
Wickham	600	£4,000	£2.40
Other Rural Local Centres	1,300	£4,000	£5.20
Rural Centres Sub-Total	3,900		£15.60
Whiteley (inc. Tesco)	10,428	£4,000	£41.71

Sources:

Goad

NLP Site Visit 2007

PP. 09/00658/OUT (Redev of Whiteley Centre)

Table 5A: Comparison Floorspace within Retail Warehouses/Out of Centre Food Stores

Retail Warehouses in Winchester	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Easton Lane Retail Park			
Homebase	4,880	£1,227	£5.99
Downs Carpets	1,050	£1,000	£1.05
Currys	700	£6,109	£4.28
Halfords	1,200	n/a	£2.20
Scats	600	n/a	£2.27
Pets At Home	700	n/a	£2.12
Fabric Warehouse	600	£2,000	£1.20
Sub-Total	9,730		£19.10
Winchester Trade Park			
Topps Tiles	180	£1,315	£0.24
Carpetright	900	£1,100	£0.99
Sub-Total	1,080		£1.23
Andover Road Retail Park			
Brewers	225	£1,500	£0.34
Pets Corner	225	£2,000	£0.45
Sub-Total	450		£0.79
Out-of-Centre Food Stores			
Tesco, Winnall (non-food sales only)	2,117	£10,039	£21.25
Sainsbury Badger Farm (non-food sales only)	1,250	£6,229	£7.79
Sub-Total	3,367		£29.04
Out-of-Centre Total	14,627	£3,429	£50.16

Sources: NLP Site Visit 2007
VOA 2005 ratings list
Retail Rankings 2010

Table 6A: Comparison Floorspace in Commitments

Location	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Commitments - Gains			
Whiteley Town Centre	4,462	£4,000	£17.85
Thornfield Silver Hill Development (1)	5,864	£6,000	£35.18
Sainsbury town centre (non-food sales only) (2)	158	£6,229	£0.98
Andover Road Retail Park	300	£2,500	£0.75
Total - Gains	10,784	£5,078	£54.77
Commitments - Losses			
Thornfield Silver Hill Development (1)	1,250	£4,000	£5.00
Sainsbury (non-food sales only)	31	£6,896	£0.21
Iceland (non-food sales only)	7	£4,000	£0.03
Total - Losses	1,288	£4,070	£5.24
Total Net Increase	9,496		£49.52

(1) Assumes up to 7,818 sq m gross - 75% net to gross ratio
(2) Net gain allowing for loss of existing store

Appendix B Convenience Retail Assessment

Table 1B: Population Projections

Zone	2001	2010	2013	2016	2021	2026
Zone 1: Winchester - West	26,987	28,335	28,387	28,462	29,077	29,253
Zone 2: Winchester - East	18,975	20,523	20,978	21,521	22,077	22,236
Zone 3: Inner Rural Area	13,481	14,540	14,792	14,883	15,324	15,451
Zone 4: Outer Rural Area - North East	16,505	17,544	18,045	18,382	19,015	19,275
Zone 5: Outer Rural Area - South East	26,506	27,590	27,909	28,122	28,586	28,719
Zone 6: Denmead	10,407	11,033	11,401	11,868	12,095	12,160
Zone 7: Wickham & Whiteley	19,226	21,838	22,957	24,341	24,707	24,951
Zone 8: Outer Rural Area - West	25,875	26,971	27,439	27,950	28,802	29,259
Zone 9: Eastleigh	39,416	41,755	42,501	43,148	44,027	45,780
Total	197,378	210,129	214,409	218,677	223,710	227,084
<i>Strategic Development Areas</i>						
(1) Hedge End SDA (Zone 5)	n/a	n/a	n/a	330	1,050	4,680
(2) Fareham SDA (Zone 7)	n/a	n/a	n/a	155	754	1,003
<i>Alternative Development Scenarios</i>						
(3) North Whiteley (Zone 7)	n/a	n/a	n/a	3,390	6,660	6,660
(4) Barton Farm (Zone 2)	n/a	n/a	n/a	2,260	4,440	4,440
(5) West Waterlooville (Zone 6)	n/a	n/a	n/a	1,130	2,220	2,220

Sources:

2001 Population Census

Hampshire County Council's Ward based population projections 2010 to 2016

Hampshire County Council's District wide projections for Winchester, Test Valley, Basingstoke & Deane, East Hampshire, Fareham and Eastleigh 2001 to 2026 minus allowance for SDA's.

(1) Hedge End SDA - assuming 2,000 additional dwellings (166 by 2016, 866 by 2021 and 2,000 by 2026)

(2) Fareham SDA - assuming 1,000 additional dwellings (100 by 2016, 500 by 2021 and 1,000 by 2026)

(3) North Whiteley - assuming 3,000 additional dwellings (1,500 by 2016 and 3,000 by 2021)

(4) Barton Farm - assuming 2,000 additional dwellings (1,000 by 2016 and 2,000 by 2021)

(5) West Waterlooville - assuming 1,000 additional dwellings (500 by 2016 and 1,000 by 2021)

Additional dwellings generate population at 2.26 per dwg in 2016 and 2.22 in 2021/2026

Table 2B: Convenience Retail Expenditure Per Capita (2008 Prices)

Expenditure Per Capita	2010	2013	2016	2021	2026	Growth 2010-2013	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
Zone 1: Winchester - West	£1,849	£1,873	£1,895	£1,943	£1,992	1.3%	2.5%	5.1%	7.7%
Zone 2: Winchester - East	£1,905	£1,930	£1,953	£2,003	£2,053	1.3%	2.5%	5.1%	7.8%
Zone 3: Inner Rural Area	£1,992	£2,018	£2,042	£2,093	£2,146	1.3%	2.5%	5.1%	7.7%
Zone 4: Outer Rural Area - North East	£2,041	£2,068	£2,093	£2,145	£2,200	1.3%	2.5%	5.1%	7.8%
Zone 5: Outer Rural Area - South East	£2,044	£2,071	£2,096	£2,148	£2,203	1.3%	2.5%	5.1%	7.7%
Zone 6: Denmead	£1,991	£2,017	£2,041	£2,092	£2,145	1.3%	2.5%	5.1%	7.7%
Zone 7: Wickham & Whiteley	£1,829	£1,852	£1,875	£1,922	£1,970	1.3%	2.5%	5.1%	7.7%
Zone 8: Outer Rural Area - West	£1,974	£2,000	£2,024	£2,075	£2,127	1.3%	2.5%	5.1%	7.8%
Zone 9: Eastleigh	£1,944	£1,969	£1,993	£2,043	£2,095	1.3%	2.5%	5.1%	7.8%

Sources:

Experian local estimates for 2008 convenience goods expenditure per capita

(Excluding special forms of trading - 1.8% in 2008, 2.0% in 2009, 2.2% in 2010, 2.3% in 2011 and 2012, 2.5% in 2013, 2.6% in 2014 and 2.8% in 2015 and beyond)

Experian Business Strategies - forecast annual growth rates for 2008 to 2011 (0%, -0.5%, -0.2% and 0.6%)

Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (0.5% per annum)

Table 3B: Total Convenience Retail Expenditure Excluding SDA's (2008 Prices)

Expenditure	2010	2013	2016	2021	2026	Growth 2010-2013	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
Zone 1: Winchester - West	£52.39	£53.17	£53.94	£56.50	£58.27	1.5%	2.9%	7.8%	11.2%
Zone 2: Winchester - East	£39.10	£40.49	£42.03	£44.22	£45.65	3.6%	7.5%	13.1%	16.8%
Zone 3: Inner Rural Area	£28.96	£29.85	£30.39	£32.07	£33.16	3.1%	4.9%	10.7%	14.5%
Zone 4: Outer Rural Area - North East	£35.81	£37.32	£38.47	£40.79	£42.41	4.2%	7.4%	13.9%	18.4%
Zone 5: Outer Rural Area - South East	£56.39	£57.80	£58.94	£61.40	£63.27	2.5%	4.5%	8.9%	12.2%
Zone 6: Denmead	£21.97	£23.00	£24.22	£25.30	£26.08	4.7%	10.3%	15.2%	18.7%
Zone 7: Wickham & Whiteley	£39.94	£42.52	£45.64	£47.49	£49.15	6.4%	14.3%	18.9%	23.1%
Zone 8: Outer Rural Area - West	£53.24	£54.88	£56.57	£59.76	£62.23	3.1%	6.3%	12.3%	16.9%
Zone 9: Eastleigh	£81.17	£83.68	£85.99	£89.95	£95.91	3.1%	5.9%	10.8%	18.2%
Catchment Area Total	£408.97	£422.70	£436.20	£457.48	£476.13	3.4%	6.7%	11.9%	16.4%
<i>Strategic Development Areas</i>									
(1) Hedge End SDA (Zone 5)	n/a	n/a	£0.62	£2.02	£9.22				
(2) Fareham SDA (Zone 7)	n/a	n/a	£0.29	£1.45	£1.98				
<i>Alternative Development Scenarios</i>									
(1) North Whiteley (Zone 7)	n/a	n/a	£6.36	£12.80	£13.12				
(2) Barton Farm (Zone 2)	n/a	n/a	£4.41	£8.89	£9.12				
(3) West Waterlooville (Zone 6)	n/a	n/a	£2.31	£4.64	£4.76				

Sources: Table 1B and 2B

Table 4B:

Estimated Convenience Shopping Penetration Rates

Store/Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Beyond Study Area
Tesco, Winnall	14%	47%	24%	55%	3%	0%	0%	8%	6%	5%
Sainsbury, Badger Farm	59%	18%	28%	11%	1%	0%	0%	8%	6%	2%
Winchester town centre	11%	24%	3%	2%	0%	0%	1%	0%	0%	15%
Winchester local centres	10%	5%	3%	1%	0%	0%	0%	0%	0%	1%
Winchester Urban Area Sub Total	94%	94%	58%	69%	4%	0%	1%	16%	12%	
Bishops Waltham	0%	0%	0%	0%	20%	0%	0%	0%	0%	1%
Denmead	0%	0%	0%	0%	0%	12%	0%	0%	0%	15%
New Alresford	0%	0%	1%	11%	0%	0%	0%	0%	0%	5%
Wickham	0%	0%	0%	0%	3%	0%	9%	0%	0%	5%
Rural Local Shops	0%	0%	8%	4%	5%	0%	1%	0%	0%	1%
Winchester Rural Area Sub Total	0%	0%	9%	15%	28%	12%	10%	0%	0%	
Whiteley	0%	0%	0%	0%	0%	0%	17%	0%	0%	70%
Other Outside Winchester District	6%	6%	33%	16%	68%	88%	72%	84%	88%	n/a
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: NEMS Household Survey June 2007

Table 5B: Convenience Turnover in Winchester 2010

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow £m	Total Turnover (£m)
Available Expenditure 2010 £M	£52.39	£39.10	£28.96	£35.81	£56.39	£21.97	£39.94	£53.24	£81.17	n/a	£408.97
Winchester Urban Area Sub Total	£49.25	£36.75	£16.80	£24.71	£2.26	£0.00	£0.40	£8.52	£9.74	£7.65	£156.07
Winchester Rural Area Sub Total	£0.00	£0.00	£2.61	£5.37	£15.79	£2.64	£3.99	£0.00	£0.00	£1.15	£31.55
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.79	£0.00	£0.00	£15.84	£22.63
Winchester LA Total	£49.25	£36.75	£19.41	£30.08	£18.05	£2.64	£11.18	£8.52	£9.74	£24.65	£210.25
Outflow from Winchester District	£3.14	£2.35	£9.56	£5.73	£38.35	£19.33	£28.76	£44.72	£71.43	n/a	n/a
Total	£52.39	£39.10	£28.96	£35.81	£56.39	£21.97	£39.94	£53.24	£81.17	n/a	n/a

Source: Tables 3B and 4B

Table 6B: Convenience Turnover in Winchester 2013

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Available Expenditure 2011 £M	£53.17	£40.49	£29.85	£37.32	£57.80	£23.00	£42.52	£54.88	£83.68	£ m	£ m
Winchester Urban Area Sub Total	£49.98	£38.06	£17.31	£25.75	£2.31	£0.00	£0.43	£8.78	£10.04	£7.88	£160.54
Winchester Rural Area Sub Total	£0.00	£0.00	£2.69	£5.60	£16.18	£2.76	£4.25	£0.00	£0.00	£1.20	£32.68
Whiteley Village Outlet Shopping	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.23	£0.00	£0.00	£16.86	£24.09
Winchester LA Total	£49.98	£38.06	£20.00	£31.35	£18.50	£2.76	£11.90	£8.78	£10.04	£25.95	£217.31
Outflow from Winchester District	£3.19	£2.43	£9.85	£5.97	£39.30	£20.24	£30.61	£46.10	£73.64	n/a	n/a
Total	£53.17	£40.49	£29.85	£37.32	£57.80	£23.00	£42.52	£54.88	£83.68	n/a	n/a

Source: Tables 3B and 4B

Table 7B: Convenience Turnover in Winchester 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Available Expenditure 2016 £M	£53.94	£42.03	£30.39	£38.47	£58.94	£24.22	£45.64	£56.57	£85.99	£ m	£ m
Winchester Urban Area Sub Total	£50.70	£39.51	£17.63	£26.55	£2.36	£0.00	£0.46	£9.05	£10.32	£8.10	£164.67
Winchester Rural Area Sub Total	£0.00	£0.00	£2.74	£5.77	£16.50	£2.91	£4.56	£0.00	£0.00	£1.25	£33.74
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.76	£0.00	£0.00	£18.10	£25.86
Winchester LA Total	£50.70	£39.51	£20.36	£32.32	£18.86	£2.91	£12.78	£9.05	£10.32	£27.46	£224.27
Outflow from Winchester District	£3.24	£2.52	£10.03	£6.16	£40.08	£21.32	£32.86	£47.52	£75.67	n/a	n/a
Total	£53.94	£42.03	£30.39	£38.47	£58.94	£24.22	£45.64	£56.57	£85.99	n/a	n/a

Source: Tables 3B and 4B

Table 8B: Convenience Turnover in Winchester 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Available Expenditure 2021 £M	£56.50	£44.22	£32.07	£40.79	£61.40	£25.30	£47.49	£59.76	£89.95	£ m	£ m
Winchester Urban Area Sub Total	£53.11	£41.57	£18.60	£28.14	£2.46	£0.00	£0.47	£9.56	£10.79	£8.53	£173.23
Winchester Rural Area Sub Total	£0.00	£0.00	£2.89	£6.12	£17.19	£3.04	£4.75	£0.00	£0.00	£1.31	£35.30
Whiteley Village Outlet Shopping	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.07	£0.00	£0.00	£18.84	£26.91
Winchester LA Total	£53.11	£41.57	£21.49	£34.26	£19.65	£3.04	£13.30	£9.56	£10.79	£28.68	£235.44
Outflow from Winchester District	£3.39	£2.65	£10.58	£6.53	£41.75	£22.27	£34.19	£50.20	£79.15	n/a	n/a
Total	£56.50	£44.22	£32.07	£40.79	£61.40	£25.30	£47.49	£59.76	£89.95	n/a	n/a

Source: Tables 3B and 4B

Table 9B:

Convenience Turnover in Winchester 2026

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Available Expenditure 2026 £M	£58.27	£45.65	£33.16	£42.41	£63.27	£26.08	£49.15	£62.23	£95.91	£ m	£ m
Winchester Urban Area Sub Total	£54.78	£42.91	£19.23	£29.26	£2.53	£0.00	£0.49	£9.96	£11.51	£8.83	£179.50
Winchester Rural Area Sub Total	£0.00	£0.00	£2.98	£6.36	£17.72	£3.13	£4.92	£0.00	£0.00	£1.36	£36.46
Whiteley Village Outlet Shopping	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.36	£0.00	£0.00	£19.50	£27.85
Winchester LA Total	£54.78	£42.91	£22.22	£35.62	£20.25	£3.13	£13.76	£9.96	£11.51	£29.68	£243.81
Outflow from Winchester District	£3.50	£2.74	£10.94	£6.78	£43.02	£22.95	£35.39	£52.28	£84.40	n/a	n/a
Total	£58.27	£45.65	£33.16	£42.41	£63.27	£26.08	£49.15	£62.23	£95.91	n/a	n/a

Source: Tables 3B and 4B

Table 10B: Summary of Convenience Turnover 2010 to 2026 (£Millions)

	2010	2013	2016	2021	2026
Available Expenditure					
Winchester Urban Area	£156.07	£160.54	£164.67	£173.23	£179.50
Winchester Rural Area	£31.55	£32.68	£33.74	£35.30	£36.46
Whiteley	£22.63	£24.09	£25.86	£26.91	£27.85
Total	£210.25	£217.31	£224.27	£235.44	£243.81
Benchmark Turnover Existing Floorspace					
Winchester Urban Area	£133.46	£134.26	£135.47	£137.52	£139.59
Winchester Rural Area	£26.00	£26.16	£26.39	£26.79	£27.19
Whiteley	£22.61	£22.75	£22.95	£23.30	£23.65
Benchmark Turnover Sub-Total	£182.07	£183.16	£184.82	£187.61	£190.44
Benchmark Turnover Commitments					
Winchester Urban Area	£0.00	£2.99	£8.71	£8.84	£8.97
Winchester Rural Area	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley	£0.00	£1.30	£1.31	£1.33	£1.35
Benchmark Turnover Sub-Total	£0.00	£4.29	£10.02	£10.17	£10.32
Surplus/Deficit Expenditure					
Winchester Urban Area	£22.61	£23.29	£20.49	£26.88	£30.93
Winchester Rural Area	£5.55	£6.52	£7.34	£8.50	£9.27
Whiteley	£0.02	£0.05	£1.60	£2.28	£2.85
Surplus/Deficit Total	£28.18	£29.86	£29.43	£37.66	£43.05
Average Sales Density (£ per Sq M Net)					
Winchester Urban Area	£10,624	£10,688	£10,784	£10,947	£11,112
Winchester Rural Area	£5,255	£5,287	£5,334	£5,415	£5,497
Whiteley	£12,611	£12,687	£12,801	£12,994	£13,191
Sales Floorspace Projection (Sq M Net)					
Winchester Urban Area	2,128	2,179	1,900	2,455	2,783
Winchester Rural Area	1,056	1,234	1,377	1,571	1,686
Whiteley	2	4	125	175	216
Surplus/Deficit Total	3,186	3,417	3,401	4,201	4,686

Source: Tables 5B to 9B

Table 11B: Summary of Convenience Turnover 2010 to 2026 including Strategic Development Areas (£Millions).

	2010	2013	2016	2021	2026
Available Expenditure					
Winchester Urban Area	£156.07	£160.54	£164.70	£173.33	£179.90
Winchester Rural Area	£31.55	£32.68	£33.94	£36.02	£39.29
Whiteley	£22.63	£24.09	£26.03	£26.91	£28.97
Total	£210.25	£217.31	£224.67	£236.26	£248.17
Benchmark Turnover Existing Floorspace					
Winchester Urban Area	£133.46	£134.26	£135.47	£137.52	£139.59
Winchester Rural Area	£26.00	£26.16	£26.39	£26.79	£27.19
Whiteley	£22.61	£22.75	£22.95	£23.30	£23.65
Benchmark Turnover Sub-Total	£182.07	£183.16	£184.82	£187.61	£190.44
Benchmark Turnover Commitments					
Winchester Urban Area	£0.00	£2.99	£8.71	£8.84	£8.97
Winchester Rural Area	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley	£0.00	£1.30	£1.31	£1.33	£1.35
Benchmark Turnover Sub-Total	£0.00	£4.29	£10.02	£10.17	£10.32
Surplus/Deficit Expenditure					
Winchester Urban Area	£22.61	£23.29	£20.52	£26.98	£31.34
Winchester Rural Area	£5.55	£6.52	£7.55	£9.23	£12.09
Whiteley	£0.02	£0.05	£1.76	£2.28	£3.97
Surplus/Deficit Total	£28.18	£29.86	£29.83	£38.49	£47.40
Average Sales Density (£ per Sq M Net)					
Winchester Urban Area	£10,624	£10,688	£10,784	£10,947	£11,112
Winchester Rural Area	£5,255	£5,287	£5,334	£5,415	£5,497
Whiteley	£12,611	£12,687	£12,801	£12,994	£13,191
Sales Floorspace Projection (Sq M Net)					
Winchester Urban Area	2,128	2,179	1,903	2,464	2,820
Winchester Rural Area	1,056	1,234	1,415	1,705	2,200
Whiteley	2	4	138	175	301
Surplus/Deficit Total	3,186	3,417	3,456	4,344	5,322

Source: Tables 5B to 9B

Table 12B: Convenience Floorspace Projections 2016 to 2026 - Development Scenarios

	Winchester Urban Area	Winchester Rural Area	Whiteley	Total
Baseline - No additional growth				
Net Sales Floorspace at:				
2016	1,900	1,377	125	3,401
2021	2,455	1,571	175	4,201
2026	2,783	1,686	216	4,686
1 - With Fareham and Hedge End SDA's				
Net Sales Floorspace at:				
2016	1,903	1,415	138	3,456
2021	2,464	1,705	175	4,344
2026	2,820	2,200	301	5,322
2 - With SDA's and 3,000 dwellings north of Whiteley				
Net Sales Floorspace at:				
2016	1,999	1,636	419	4,054
2021	2,595	2,074	797	5,465
2026	2,967	2,603	865	6,435
3 - With SDA's and 2,000 dwellings at Barton Farm				
Net Sales Floorspace at:				
2016	2,425	1,503	138	4,066
2021	3,440	1,810	239	5,489
2026	3,821	2,337	301	6,459
4 - With SDA's and 1,000 dwellings at West Waterlooville				
Net Sales Floorspace at:				
2016	1,992	1,568	138	3,698
2021	2,580	1,939	239	4,758
2026	2,953	2,467	301	5,721

Appendix C Comparison Retail Assessment

Table 1C: Comparison Goods Retail Expenditure Per Capita (2008 Prices)

Expenditure Per Capita	2010	2013	2016	2021	2026	Growth 2010-2013	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
Zone 1: Winchester - West	£2,823	£3,115	£3,575	£4,498	£5,659	10.3%	26.6%	59.3%	100.5%
Zone 2: Winchester - East	£2,852	£3,147	£3,611	£4,544	£5,717	10.3%	26.6%	59.3%	100.5%
Zone 3: Inner Rural Area	£3,148	£3,474	£3,987	£5,016	£6,311	10.4%	26.7%	59.3%	100.5%
Zone 4: Outer Rural Area - North East	£3,222	£3,555	£4,080	£5,134	£6,459	10.3%	26.6%	59.3%	100.5%
Zone 5: Outer Rural Area - South East	£3,233	£3,567	£4,094	£5,151	£6,481	10.3%	26.6%	59.3%	100.5%
Zone 6: Denmead	£3,053	£3,369	£3,867	£4,865	£6,121	10.4%	26.7%	59.4%	100.5%
Zone 7: Wickham & Whiteley	£2,837	£3,130	£3,593	£4,520	£5,687	10.3%	26.6%	59.3%	100.5%
Zone 8: Outer Rural Area - West	£3,042	£3,357	£3,853	£4,848	£6,099	10.4%	26.7%	59.4%	100.5%
Zone 9: Eastleigh	£3,004	£3,314	£3,804	£4,786	£6,021	10.3%	26.6%	59.3%	100.4%

Sources:

Experian local estimates for 2008 comparison goods expenditure per capita

(Excluding special forms of trading - 7.7% in 2008, 8.1% in 2009, 8.5% in 2010, 8.9% in 2011 and beyond)

Experian Business Strategies - forecast annual growth rates for 2008 to 2011 (0%, 1.1%, -0.4%, 1.1%)

Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (4.7% per annum)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2008 Prices)

Expenditure	2010	2013	2016	2021	2026	Growth 2010-2013	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
Zone 1: Winchester - West	£79.99	£88.43	£101.75	£130.79	£165.54	10.5%	27.2%	63.5%	107.0%
Zone 2: Winchester - East	£58.53	£66.02	£77.71	£100.32	£127.12	12.8%	32.8%	71.4%	117.2%
Zone 3: Inner Rural Area	£45.77	£51.39	£59.34	£76.87	£97.51	12.3%	29.6%	67.9%	113.0%
Zone 4: Outer Rural Area - North East	£56.53	£64.15	£75.00	£97.62	£124.50	13.5%	32.7%	72.7%	120.2%
Zone 5: Outer Rural Area - South East	£89.20	£99.55	£115.13	£147.25	£186.13	11.6%	29.1%	65.1%	108.7%
Zone 6: Denmead	£33.68	£38.41	£45.89	£58.84	£74.43	14.0%	36.2%	74.7%	121.0%
Zone 7: Wickham & Whiteley	£61.95	£71.86	£87.46	£111.68	£141.90	16.0%	41.2%	80.3%	129.0%
Zone 8: Outer Rural Area - West	£82.05	£92.11	£107.69	£139.63	£178.45	12.3%	31.3%	70.2%	117.5%
Zone 9: Eastleigh	£125.43	£140.85	£164.13	£210.71	£275.64	12.3%	30.9%	68.0%	119.8%
Catchment Area Total	£633.13	£712.76	£834.11	£1,073.70	£1,371.22	12.6%	31.7%	69.6%	116.6%
<i>Strategic Development Areas</i>									
(1) Hedge End SDA (Zone 5)	n/a	n/a	£1.35	£5.41	£30.33				
(2) Fareham SDA (Zone 7)	n/a	n/a	£0.56	£3.41	£5.70				
<i>Alternative Development Scenarios</i>									
(1) North Whiteley (Zone 7)	n/a	n/a	£12.18	£30.10	£37.88				
(2) Barton Farm (Zone 2)	n/a	n/a	£8.16	£20.18	£25.38				
(3) West Waterlooville (Zone 6)	n/a	n/a	£4.37	£10.80	£13.59				

Sources: Table 2B and 1C

Table 3C: Comparison Expenditure Penetration Rates and Turnover 2010

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Available Expenditure 2010	£79.99	£58.53	£45.77	£56.53	£89.20	£33.68	£61.95	£82.05	£125.43	n/a	£633.13
Market Share											
Winchester town centre	56%	57%	36%	49%	7%	0%	1%	10%	8%	15%	
Winchester local shops	2%	2%	1%	1%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	9%	10%	6%	8%	1%	0%	0%	1%	0%	5%	
Winchester urban area sub-total	67%	69%	43%	58%	8%	0%	1%	11%	8%	14%	
Bishops Waltham	0%	0%	0%	0%	8%	0%	1%	0%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	0%	15%	
New Alresford	0%	0%	1%	7%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	3%	0%	0%	5%	
Rural Local Shops	0%	0%	2%	2%	2%	0%	1%	0%	0%	2%	
Winchester rural sub-total	0%	0%	3%	9%	11%	2%	5%	0%	0%	3%	
Whiteley	0%	0%	1%	0%	1%	1%	3%	0%	0%	85%	
Winchester LA Total	67%	69%	47%	67%	20%	3%	9%	11%	8%	n/a	
Other outside Winchester District	33%	31%	53%	33%	80%	97%	91%	89%	92%	n/a	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
Turnover £M											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Winchester town centre	£44.79	£33.36	£16.48	£27.70	£6.24	£0.00	£0.62	£8.20	£10.03	£26.02	£173.45
Winchester local shops	£1.60	£1.17	£0.46	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£3.83
Winchester out-of-centre	£7.20	£5.85	£2.75	£4.52	£0.89	£0.00	£0.00	£0.82	£0.00	£1.16	£23.19
Winchester urban area sub-total	£53.59	£40.39	£19.68	£32.79	£7.14	£0.00	£0.62	£9.03	£10.03	£27.22	£200.48
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£7.14	£0.00	£0.62	£0.00	£0.00	£0.08	£7.83
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.00	£0.00	£0.00	£0.12	£0.79
New Alresford	£0.00	£0.00	£0.46	£3.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£4.65
Wickham	£0.00	£0.00	£0.00	£0.00	£0.89	£0.00	£1.86	£0.00	£0.00	£0.14	£2.90
Rural Local Shops	£0.00	£0.00	£0.92	£1.13	£1.78	£0.00	£0.62	£0.00	£0.00	£0.09	£4.54
Winchester rural sub-total	£0.00	£0.00	£1.37	£5.09	£9.81	£0.67	£3.10	£0.00	£0.00	£0.67	£20.71
Whiteley	£0.00	£0.00	£0.46	£0.00	£0.89	£0.34	£1.86	£0.00	£0.00	£20.09	£23.63
Winchester LA Total	£53.59	£40.39	£21.51	£37.87	£17.84	£1.01	£5.58	£9.03	£10.03	£47.97	£244.82
Other outside Winchester District	£26.40	£18.14	£24.26	£18.65	£71.36	£32.67	£56.38	£73.02	£115.40	n/a	n/a
Total	£79.99	£58.53	£45.77	£56.53	£89.20	£33.68	£61.95	£82.05	£125.43	n/a	n/a

Sources: NEMS Household Survey June 2007
Tables 2C

Table 4C: Comparison Expenditure Penetration Rates and Turnover 2013

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Available Expenditure 2013	£88.43	£66.02	£51.39	£64.15	£99.55	£38.41	£71.86	£92.11	£140.85	n/a	£712.76
Market Share											
Winchester town centre	59%	58%	42%	48%	6%	0%	1%	10%	7%	15%	
Winchester local shops	2%	2%	1%	1%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	9%	10%	5%	8%	1%	0%	0%	1%	0%	5%	
Winchester urban area sub-total	70%	70%	48%	57%	7%	0%	1%	11%	7%	14%	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	0%	15%	
New Alresford	0%	0%	1%	6%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	0%	5%	
Rural Local Shops	0%	0%	2%	2%	2%	0%	1%	0%	0%	2%	
Winchester rural sub-total	0%	0%	3%	8%	10%	2%	4%	0%	0%	3%	
Whiteley	0%	0%	4%	2%	6%	6%	16%	0%	2%	60%	
Winchester LA Total	70%	70%	55%	67%	23%	8%	21%	11%	9%	n/a	
Other outside Winchester District	30%	30%	45%	33%	77%	92%	79%	89%	91%	n/a	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
Turnover £M											
Winchester town centre	£52.17	£38.29	£21.58	£30.79	£5.97	£0.00	£0.72	£9.21	£9.86	£29.75	£198.35
Winchester local shops	£1.77	£1.32	£0.51	£0.64	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£4.29
Winchester out-of-centre	£7.96	£6.60	£2.57	£5.13	£1.00	£0.00	£0.00	£0.92	£0.00	£1.27	£25.45
Winchester urban area sub-total	£61.90	£46.21	£24.67	£36.57	£6.97	£0.00	£0.72	£10.13	£9.86	£31.07	£228.09
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£6.97	£0.00	£0.72	£0.00	£0.00	£0.08	£7.76
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.14	£0.90
New Alresford	£0.00	£0.00	£0.51	£3.85	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£4.59
Wickham	£0.00	£0.00	£0.00	£0.00	£1.00	£0.00	£1.44	£0.00	£0.00	£0.13	£2.56
Rural Local Shops	£0.00	£0.00	£1.03	£1.28	£1.99	£0.00	£0.72	£0.00	£0.00	£0.10	£5.12
Winchester rural sub-total	£0.00	£0.00	£1.54	£5.13	£9.96	£0.77	£2.87	£0.00	£0.00	£0.67	£20.94
Whiteley	£0.00	£0.00	£1.26	£1.28	£5.97	£2.30	£11.50	£0.00	£2.82	£38.90	£64.83
Winchester LA Total	£61.90	£46.21	£28.26	£42.98	£22.90	£3.07	£15.09	£10.13	£12.68	£70.64	£313.86
Other outside Winchester District	£26.53	£19.81	£23.12	£21.17	£76.65	£35.34	£56.77	£81.98	£128.17	n/a	n/a
Total	£88.43	£66.02	£51.39	£64.15	£99.55	£38.41	£71.86	£92.11	£140.85	n/a	n/a

Sources: NEMS Household Survey June 2007

Tables 2C

*Shares take account of Whiteley Redevelopment

Table 5C: Comparison Expenditure Penetration Rates and Turnover 2016

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Available Expenditure 2016	£101.75	£77.71	£59.34	£75.00	£115.13	£45.89	£87.46	£107.69	£164.13	n/a	£834.11
Market Share											
Winchester town centre	59%	58%	42%	48%	6%	0%	1%	10%	7%	15%	
Winchester local shops	2%	2%	1%	1%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	9%	10%	5%	8%	1%	0%	0%	1%	0%	5%	
Winchester urban area sub-total	70%	70%	48%	57%	7%	0%	1%	11%	7%	14%	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	0%	15%	
New Alresford	0%	0%	1%	6%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	0%	5%	
Rural Local Shops	0%	0%	2%	2%	2%	0%	1%	0%	0%	2%	
Winchester rural sub-total	0%	0%	3%	8%	10%	2%	4%	0%	0%	3%	
Whiteley	0%	0%	4%	2%	6%	6%	16%	0%	2%	60%	
Winchester LA Total	70%	70%	55%	67%	23%	8%	21%	11%	9%	n/a	
Other outside Winchester District	30%	30%	45%	33%	77%	92%	79%	89%	91%	n/a	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Turnover £M											
Winchester town centre	£60.03	£45.07	£24.92	£36.00	£6.91	£0.00	£0.87	£10.77	£11.49	£34.60	£230.67
Winchester local shops	£2.04	£1.55	£0.59	£0.75	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£4.98
Winchester out-of-centre	£9.16	£7.77	£2.97	£6.00	£1.15	£0.00	£0.00	£1.08	£0.00	£1.48	£29.60
Winchester urban area sub-total	£71.23	£54.40	£28.48	£42.75	£8.06	£0.00	£0.87	£11.85	£11.49	£36.13	£265.26
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£8.06	£0.00	£0.87	£0.00	£0.00	£0.09	£9.02
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.92	£0.00	£0.00	£0.00	£0.16	£1.08
New Alresford	£0.00	£0.00	£0.59	£4.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£5.36
Wickham	£0.00	£0.00	£0.00	£0.00	£1.15	£0.00	£1.75	£0.00	£0.00	£0.15	£3.05
Rural Local Shops	£0.00	£0.00	£1.19	£1.50	£2.30	£0.00	£0.87	£0.00	£0.00	£0.12	£5.98
Winchester rural sub-total	£0.00	£0.00	£1.78	£6.00	£11.51	£0.92	£3.50	£0.00	£0.00	£0.79	£24.50
Whiteley	£0.00	£0.00	£2.37	£1.50	£6.91	£2.75	£13.99	£0.00	£3.28	£46.22	£77.03
Winchester LA Total	£71.23	£54.40	£32.64	£50.25	£26.48	£3.67	£18.37	£11.85	£14.77	£83.14	£366.79
Other outside Winchester District	£30.53	£23.31	£26.70	£24.75	£88.65	£42.22	£69.09	£95.85	£149.36	n/a	n/a
Total	£101.75	£77.71	£59.34	£75.00	£115.13	£45.89	£87.46	£107.69	£164.13	n/a	n/a

Sources: NEMS Household Survey June 2007

Tables 2C

*Shares take account of Whiteley Redevelopment

Table 6C: Comparison Expenditure Penetration Rates and Turnover 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Available Expenditure 2021	£130.79	£100.32	£76.87	£97.62	£147.25	£58.84	£111.68	£139.63	£210.71	n/a	£1,073.70
Market Share											
Winchester town centre	59%	58%	42%	48%	6%	0%	1%	10%	7%	15%	
Winchester local shops	2%	2%	1%	1%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	9%	10%	5%	8%	1%	0%	0%	1%	0%	5%	
Winchester urban area sub-total	70%	70%	48%	57%	7%	0%	1%	11%	7%	14%	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	0%	15%	
New Alresford	0%	0%	1%	6%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	0%	5%	
Rural Local Shops	0%	0%	2%	2%	2%	0%	1%	0%	0%	2%	
Winchester rural sub-total	0%	0%	3%	8%	10%	2%	4%	0%	0%	3%	
Whiteley	0%	0%	4%	2%	6%	6%	16%	0%	2%	60%	
Winchester LA Total	70%	70%	55%	67%	23%	8%	21%	11%	9%	n/a	
Other outside Winchester District	30%	30%	45%	33%	77%	92%	79%	89%	91%	n/a	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
Turnover £M											
Winchester town centre	£77.17	£58.18	£32.28	£46.86	£8.83	£0.00	£1.12	£13.96	£14.75	£44.67	£297.83
Winchester local shops	£2.62	£2.01	£0.77	£0.98	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£6.43
Winchester out-of-centre	£11.77	£10.03	£3.84	£7.81	£1.47	£0.00	£0.00	£1.40	£0.00	£1.91	£38.24
Winchester urban area sub-total	£91.55	£70.22	£36.90	£55.65	£10.31	£0.00	£1.12	£15.36	£14.75	£46.65	£342.50
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£10.31	£0.00	£1.12	£0.00	£0.00	£0.12	£11.54
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.18	£0.00	£0.00	£0.00	£0.21	£1.38
New Alresford	£0.00	£0.00	£0.77	£5.86	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£6.97
Wickham	£0.00	£0.00	£0.00	£0.00	£1.47	£0.00	£2.23	£0.00	£0.00	£0.20	£3.90
Rural Local Shops	£0.00	£0.00	£1.54	£1.95	£2.94	£0.00	£1.12	£0.00	£0.00	£0.15	£7.71
Winchester rural sub-total	£0.00	£0.00	£2.31	£7.81	£14.72	£1.18	£4.47	£0.00	£0.00	£1.02	£31.51
Whiteley	£0.00	£0.00	£3.07	£1.95	£8.83	£3.53	£17.87	£0.00	£4.21	£59.21	£98.69
Winchester LA Total	£91.55	£70.22	£42.28	£65.41	£33.87	£4.71	£23.45	£15.36	£18.96	£106.88	£472.69
Other outside Winchester District	£39.24	£30.10	£34.59	£32.22	£113.38	£54.13	£88.22	£124.27	£191.75	n/a	n/a
Total	£130.79	£100.32	£76.87	£97.62	£147.25	£58.84	£111.68	£139.63	£210.71	n/a	n/a

Sources: NEMS Household Survey June 2007

Tables 2C

*Shares take account of Whiteley Redevelopment

Table 7C: Comparison Expenditure Penetration Rates and Turnover 2026

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Available Expenditure 2026	£165.54	£127.12	£97.51	£124.50	£186.13	£74.43	£141.90	£178.45	£275.64	n/a	£1,371.22
Market Share											
Winchester town centre	59%	58%	42%	48%	6%	0%	1%	10%	7%	15%	
Winchester local shops	2%	2%	1%	1%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	9%	10%	5%	8%	1%	0%	0%	1%	0%	5%	
Winchester urban area sub-total	70%	70%	48%	57%	7%	0%	1%	11%	7%	14%	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	0%	15%	
New Alresford	0%	0%	1%	6%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	0%	5%	
Rural Local Shops	0%	0%	2%	2%	2%	0%	1%	0%	0%	2%	
Winchester rural sub-total	0%	0%	3%	8%	10%	2%	4%	0%	0%	3%	
Whiteley	0%	0%	4%	2%	6%	6%	16%	0%	2%	60%	
Winchester LA Total	70%	70%	55%	67%	23%	8%	21%	11%	9%	n/a	
Other outside Winchester District	30%	30%	45%	33%	77%	92%	79%	89%	91%	n/a	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
Turnover £M											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expenditure	Total £M
Winchester town centre	£97.67	£73.73	£40.95	£59.76	£11.17	£0.00	£1.42	£17.85	£19.29	£56.80	£378.64
Winchester local shops	£3.31	£2.54	£0.98	£1.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£8.15
Winchester out-of-centre	£14.90	£12.71	£4.88	£9.96	£1.86	£0.00	£0.00	£1.78	£0.00	£2.43	£48.52
Winchester urban area sub-total	£115.88	£88.99	£46.81	£70.96	£13.03	£0.00	£1.42	£19.63	£19.29	£59.30	£435.31
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£13.03	£0.00	£1.42	£0.00	£0.00	£0.15	£14.59
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.49	£0.00	£0.00	£0.00	£0.26	£1.75
New Alresford	£0.00	£0.00	£0.98	£7.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£8.89
Wickham	£0.00	£0.00	£0.00	£0.00	£1.86	£0.00	£2.84	£0.00	£0.00	£0.25	£4.95
Rural Local Shops	£0.00	£0.00	£1.95	£2.49	£3.72	£0.00	£1.42	£0.00	£0.00	£0.20	£9.78
Winchester rural sub-total	£0.00	£0.00	£2.93	£9.96	£18.61	£1.49	£5.68	£0.00	£0.00	£1.30	£39.96
Whiteley	£0.00	£0.00	£3.90	£2.49	£11.17	£4.47	£22.70	£0.00	£5.51	£75.36	£125.60
Winchester LA Total	£115.88	£88.99	£53.63	£83.41	£42.81	£5.95	£29.80	£19.63	£24.81	£135.96	£600.87
Other outside Winchester District	£49.66	£38.14	£43.88	£41.08	£143.32	£68.48	£112.10	£158.82	£250.83	n/a	n/a
Total	£165.54	£127.12	£97.51	£124.50	£186.13	£74.43	£141.90	£178.45	£275.64	n/a	n/a

Sources: NEMS Household Survey June 2007

Tables 2C

*Shares take account of Whiteley Redevelopment

Table 8C: Summary of Comparison Turnover 2010 to 2026 (£Millions) - Baseline

	2010	2013	2016	2021	2026
Available Expenditure					
Winchester town centre	£173.45	£198.35	£230.67	£297.83	£378.64
Winchester local shops	£3.83	£4.29	£4.98	£6.43	£8.15
Winchester out-of-centre	£23.19	£25.45	£29.60	£38.24	£48.52
Winchester urban area sub-total	£200.48	£228.09	£265.26	£342.50	£435.31
Bishops Waltham	£7.83	£7.76	£9.02	£11.54	£14.59
Denmead	£0.79	£0.90	£1.08	£1.38	£1.75
New Alresford	£4.65	£4.59	£5.36	£6.97	£8.89
Wickham	£2.90	£2.56	£3.05	£3.90	£4.95
Rural Local Shops	£4.54	£5.12	£5.98	£7.71	£9.78
Winchester rural centres sub-total	£20.71	£20.94	£24.50	£31.51	£39.96
Whiteley	£23.63	£64.83	£77.03	£98.69	£125.60
Winchester LA Total	£244.82	£313.86	£366.79	£472.69	£600.87
Benchmark Turnover - Existing Floorspace					
Winchester urban area	£196.20	£204.13	£216.62	£239.17	£264.06
Winchester rural centres	£15.60	£16.23	£17.22	£19.02	£21.00
Whiteley	£41.71	£43.40	£46.05	£50.84	£56.14
Total	£253.51	£263.75	£279.90	£309.03	£341.19
Benchmark Turnover - Commitments					
Winchester urban area	£0.00	£0.75	£31.72	£35.02	£38.66
Winchester rural centres	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley	£0.00	£17.85	£18.94	£20.91	£23.09
Total	£0.00	£18.60	£50.66	£55.93	£61.75
Surplus/Deficit Expenditure					
Winchester urban area	£4.28	£23.21	£16.92	£68.32	£132.59
Winchester rural centres	£5.11	£4.71	£7.28	£12.49	£18.96
Whiteley	-£18.08	£3.58	£12.03	£26.93	£46.37
Total	-£8.69	£31.51	£36.23	£107.73	£197.93
Average Sales Density (£ per Sq M Net)					
Winchester urban area	£5,000	£5,202	£5,520	£6,095	£6,729
Winchester rural area	£4,000	£4,162	£4,416	£4,876	£5,383
Whiteley Village	£4,000	£4,162	£4,416	£4,876	£5,383
Sales Floorspace Projection (Sq M Net)					
Winchester urban area	856	4,462	3,065	11,208	19,703
Winchester rural area	1,277	1,133	1,648	2,561	3,522
Whiteley	-4,519	860	2,725	5,523	8,614
Surplus/Deficit Total	-2,386	6,455	7,438	19,293	31,840

Sources: Tables 3C to 7C

Table 9C: Summary of Comparison Turnover 2010 to 2026 including Strategic Development Areas (£Millions)

	2010	2013	2016	2021	2026
Available Expenditure					
Winchester town centre	£173.45	£198.35	£230.77	£298.25	£380.85
Winchester local shops	£3.83	£4.29	£4.98	£6.43	£8.15
Winchester out-of-centre	£23.19	£25.45	£29.62	£38.29	£48.84
Winchester urban area sub-total	£200.48	£228.09	£265.37	£342.98	£437.84
Bishops Waltham	£7.83	£7.76	£9.13	£11.96	£16.80
Denmead	£0.79	£0.90	£1.08	£1.38	£1.75
New Alresford	£4.65	£4.59	£5.36	£6.97	£8.89
Wickham	£2.90	£2.56	£3.08	£4.03	£5.39
Rural Local Shops	£4.54	£5.12	£6.02	£7.85	£10.45
Winchester rural centres sub-total	£20.71	£20.94	£24.66	£32.20	£43.28
Whiteley	£23.63	£64.83	£77.45	£100.86	£132.43
Winchester LA Total	£244.82	£313.86	£367.49	£476.04	£613.55
Benchmark Turnover - Existing Floorspace					
Winchester urban area	£196.20	£204.13	£216.62	£239.17	£264.06
Winchester rural centres	£15.60	£16.23	£17.22	£19.02	£21.00
Whiteley	£41.71	£43.40	£46.05	£50.84	£56.14
Total	£253.51	£263.75	£279.90	£309.03	£341.19
Benchmark Turnover - Commitments					
Winchester urban area	£0.00	£0.75	£31.72	£35.02	£38.66
Winchester rural centres	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley Village	£0.00	£17.85	£18.94	£20.91	£23.09
Total	£0.00	£18.60	£50.66	£55.93	£61.75
Surplus/Deficit Expenditure					
Winchester urban area	£4.28	£23.21	£17.04	£68.79	£135.12
Winchester rural centres	£5.11	£4.71	£7.44	£13.18	£22.28
Whiteley Village	-£18.08	£3.58	£12.46	£29.10	£53.20
Total	-£8.69	£31.51	£36.93	£111.08	£210.60
Average Sales Density (£ per Sq M Net)					
Winchester urban area	£5,000	£5,202	£5,520	£6,095	£6,729
Winchester rural area	£4,000	£4,162	£4,416	£4,876	£5,383
Whiteley	£4,000	£4,162	£4,416	£4,876	£5,383
Sales Floorspace Projection (Sq M Net)					
Winchester urban area	856	4,462	3,086	11,287	20,079
Winchester rural area	1,277	1,133	1,684	2,703	4,139
Whiteley	-4,519	860	2,821	5,969	9,883
Surplus/Deficit Total	-2,386	6,455	7,591	19,959	34,101

Sources: Tables 3C to 7C

Table 10C: Comparison Floorspace Projections 2016 to 2026 - Development Scenarios

	Winchester Urban Area	Winchester Rural Area	Whiteley	Total
Baseline - No additional growth				
Net Sales Floorspace at:				
2016	3,065	1,648	2,725	7,438
2021	11,208	2,561	5,523	19,293
2026	19,703	3,522	8,614	31,840
1 - With Fareham and Hedge End SDA's				
Net Sales Floorspace at:				
2016	3,086	1,684	2,821	7,591
2021	11,287	2,703	5,969	19,959
2026	20,079	4,139	9,883	34,101
1 - With SDA's and 3,000 dwellings north of Whiteley				
Net Sales Floorspace at:				
2016	3,112	1,798	3,924	8,835
2021	11,345	2,958	8,438	22,742
2026	20,145	4,430	12,697	37,272
2 - With SDA's and 2,000 dwellings at Barton Farm				
Net Sales Floorspace at:				
2016	4,280	1,684	2,821	8,786
2021	13,961	2,703	5,969	22,633
2026	23,126	4,139	8,614	35,879
3 - With SDA's and 1,000 dwellings at West Waterlooville				
Net Sales Floorspace at:				
2016	3,086	1,708	2,969	7,763
2021	11,287	2,755	6,301	20,343
2026	20,079	4,198	10,262	34,539