Nathaniel Lichfield and Partners

Planning Design Economics

TEST VALLEY BOROUGH COUNCIL

RETAIL CAPACITY STUDY

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Executive Summary

GLOSSARY OF TERMS

Convenience Goods	Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods.
Experian	A data consultancy who are widely used for retail planning information.
Goad Plans	Town centre plans prepared by Experian, which a based on occupier surveys of over 1,200 town centres across the country.
Gross floorspace	Total external floorspace including exterior walls.
Higher order comparison goods	Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.
Lower order comparison goods	Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.
Market share Penetration rate	The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.
Multiple traders	National or regional *'chain store'* retailers.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Zone A Rent	The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.

EXECUTIVE SUMMARY

Purpose of the Study

1. Nathaniel Lichfield & Partners (NLP) was commissioned by Test Valley Borough Council to prepare a Borough wide retail capacity assessment. The study includes:

- a qualitative analysis of the existing structure and hierarchy of centres within the sub-region;
- a qualitative assessment of existing retail facilities in the Borough and an assessment of the future needs for additional retail facilities up to 2026;
- an assessment of current and future competition from other centres outside the Borough; and
- recommendations relating to spatial planning policies suitable for inclusion in appropriate development plan documents, which may include advice on preferred broad locations for development, future monitoring and future objectives for emerging LDF policies.

The Potential for Retail Development

Convenience Retailing (Food and Grocery)

2. An assessment of available expenditure and existing shopping patterns suggests that convenience goods sales floorspace within the Borough is collectively trading about 30% above the expected levels, £38.56 million above average. However, this surplus will be absorbed by the proposed Asda store in Andover.

3. In qualitative terms, the Borough has a good selection of large food stores, supported by a range of smaller supermarkets and convenience stores.

4. The quantitative capacity analysis indicates there is limited potential for convenience goods sales floorspace within Andover for the foreseeable future, perhaps up tot 2021. There may be some potential in Romsey, e.g. small stores or extensions to existing stores. If Romsey can claw back expenditure leakage there could be scope for a new food store of at least 1,400 sq m net by 2011.

5. If additional residential development is implemented in Andover and Romsey as propose din the draft South East Plan then there may be scope for medium sized stores (about 1,000 to 1,200 sq m net) in both Andover and Romsey by 2016, which would be provided within new neighbourhood centres serving the proposed residential development.

Comparison Retailing (Non-Food Durable Goods)

6. An assessment of available expenditure and existing shopping patterns suggest that a significant amount of comparison goods expenditure in the study area is spent at shopping centres outside the Borough, and residents have a significant choice of

shopping destinations e.g. Basingstoke, Southampton and Winchester. Andover and Romsey town centres are the main comparison shopping destinations in the Borough.

7. Overall comparison retail sales floorspace within the Borough appears to be trading healthily, which is consistent with relatively low shop vacancy rate.

8. Major retail development in the Borough could change existing shopping patterns and could reduce comparison expenditure leakage. Conversely improvements in competing centres may increase expenditure leakage from the study area. Comparison floorspace projections for Andover and Romsey are shown in the Table below.

Additional Comparison Goods Floorspace Projections
(Assuming high street shop floorspace only)

Scenario 1 – No RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	1,757	5,186	10,034	15,275
Romsey	2,965	4,555	6,233	7,958
Scenario 2 – With RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	3,887	7,997	13,710	19,984
Romsey	3,323	5,781	8,534	10,919

Additional Comparison Sales Floorspace Projections

(Assuming high street shop and retail warehouse floorspace)

Scenario 1 – No RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover – High Street	1,406	4,149	8,027	12,220
Andover – Retail Warehouse	703	2,075	4,013	5,657
Romsey – High Street	2,372	3,644	4,986	6,367
Romsey – Retail Warehouses	1,186	1,822	2,493	2,947
Scenario 2 – With RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover – High Street	3,109	6,397	10,968	15,987
Andover – Retail Warehouse	1,555	3,199	5,483	7,400
Romsey – High Street	2,659	4,625	6,828	8,736
Romsey – Retail Warehouses	1,330	2,313	3,413	4,044

9. These capacity projections suggest there is scope for a reasonable amount of additional comparison goods retail development within Andover and Romsey up to 2016. The long term projections beyond 2016 should be treated with caution. In Andover there could be scope for about 5,200 to 6,200 sq m net, depending on the mix of high street and retail warehouse floorspace. If the draft RSS's additional housing development is implemented then this would increase to 8,000 to 9,600 sq m net.

10. In Romsey there could be scope for about 4,600 to 5,500 sq m net, again depending on the mix of high street and retail warehouse floorspace. If the draft RSS's additional housing development is implemented then this would increase to 5,800 to 6,900 sq m net.

11. In qualitative terms, residents in the Borough have a good choice of high street comparison shopping destinations. Residents in the north have access to Basingstoke and Newbury, in addition to Andover. In the south, Romsey has a more limited provision of comparison shops, but residents have good access to Southampton. Salisbury and Winchester are also accessible to the Borough's residents.

12. The existing provision of retail warehouse stores in Andover is good. The retail park in Nursling primarily serves the Totton area and the north west of Southampton.

Future Strategy Implementation and Monitoring

13. There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within PPS6, particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- measures to improve accessibility and public transport to the town and local centres in order to encourage more residents to shop in their nearest centre;
- the implementation of shop frontage policies within the development plan to protect retail and other desirable town centre uses; and
- measures to bring forward development opportunities.

14. The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period. The recommendations in this study should be reviewed and updated as necessary in 4-5 years time.

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Test Valley Borough Council to prepare a retail capacity study of Test Valley Borough, including an assessment of the need for both convenience and comparison goods floorspace. The objectives of the study are to provide:

- a qualitative analysis of the existing structure and hierarchy of centres within the sub-region;
- a qualitative assessment of existing retail facilities in the Borough and an assessment of the future needs for additional retail facilities up to 2026;
- an assessment of current and future competition from other centres outside the Borough; and
- recommendations relating to spatial planning policies suitable for inclusion in appropriate development plan documents, which may include advice on preferred broad locations for development, future monitoring and future objectives for emerging LDF policies.

Content of the Report

1.2 Section 2.0 provides an overview of the national, regional and local planning policy context. Section 3.0 provides a description of the shopping hierarchy in Test Valley and the surrounding area.

1.3 Section 4.0 sets out an analysis of shopping needs within Test Valley and assess the ability of existing facilities to meet the needs of the community. Section 5.0 sets out recommendations and conclusions.

2.0 THE SHOPPING HIERARCHY AND CATCHMENT AREA

Major Shopping Centres in Test Valley Borough and the Surrounding Area

2.1 As indicated in the analysis of regional and local policy, Andover and Romsey are the two main shopping centres within the Test Valley Borough. These town centres are influenced by major shopping destinations surrounding the Borough, including Southampton (9 miles from Romsey and 30 miles from Andover), Basingstoke (23 miles from Andover and 35 miles from Romsey), Portsmouth (28 miles from Romsey and 46 miles from Andover), Salisbury (17 miles from Romsey and 24 miles from Andover), Bournemouth (29 miles from Romsey and 47 miles from Andover), Newbury (16 miles from Andover and 43 miles from Romsey) and Winchester (15 miles from Andover and 17 miles from Romsey). Southampton, Basingstoke and Portsmouth are Primary Regional Centres as defined in the Draft South East Plan. Residents in the Borough have relatively good access to both centres by bus and train.

2.2 Management Horizons' Europe UK Shopping Index 2003/2004 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. Management Horizon's rank for centres in the Borough and other shopping centres in the sub-region is shown in Table 2.1.

2.3 Southampton is ranked 15th and the third highest in the South East region as a whole. There are a number of other centres surrounding the Borough that are ranked above Andover and Romsey. Andover has a comparatively high ranking, reflecting the reasonable number of multiple retailers represented in the town centre, whilst Romsey has a relatively low ranking. Andover is ranked as the main centre in Test Valley Borough, and is 187th out of 1,672 centres across Great Britain, with a score of 101. Romsey is ranked 664th with a lower score of 28.

Table 2.1 Management Horizons Europe Shopping Index (2004)

Venue	MHE Index Score	Rank
Southampton	258	15
Basingstoke	181	47
Salisbury	176	53
Portsmouth	159	73
Bournemouth	155	78
Winchester	127	121
Newbury	110	161
Andover	**101**	**187**
Fareham	95	201
Eastleigh	79	236
Boscombe	74	251
Waterlooville	69	276
Gosport	65	296
Shirley	49	399
Southsea	48	404
Devizes	46	421
Christchurch	46	421
Lymington	46	421
Hedge End	45	435
Ringwood	38	502
Totton	33	575
Portswood	30	624
Romsey	**28**	**664**
Bitterne	23	800
Chandlers Ford	23	800

2.4 The catchment areas of the centres listed in Table 2.1 overlap to large extent. Parts of Test Valley Borough fall within the catchment areas of centres outside the Borough in particular Southampton and Eastleigh to the south of the Borough, Winchester and Salisbury in the central part of the Borough and Basingstoke and Newbury to the north. A significant proportion of residents travel to these towns, particularly for higher order comparison shopping, such as clothing and footwear to Southampton.

2.5 The relative performance and importance of town centres can be demonstrated by commercial yields and Zone A rental levels achieved for retail property. Retail yields for the established large centres in the sub-region are shown in Table 2.2 and a comparison of Zone A rental levels is shown in Table 2.3. Published data is not available for small town centres including Romsey.

2.6 Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.

2.7 Current retail yields in Andover are 6.25%. Yields within Andover town centre have varied only slightly since the mid-1990's. Current yields within Andover are only slightly higher (worse) than yields in Portsmouth, Winchester and Salisbury, but are significantly higher (worse) than yields in larger centres in Bournemouth, Newbury, Basingstoke and Southampton. Yields in Andover are slightly lower (better) than in Shirley, and are significantly lower (better) than in Eastleigh, Boscombe, Fareham and Gosport.

2.8 In 2006, Zone A retail rents in Andover were £861 per sq m (£80 per sq ft). Rental levels in Andover rose by approximately 10% between 1987 and 1997, and levels remained static until 2002. Andover has experienced strong growth since 2002, but this growth trend has been achieved in other centres in the sub-region.

2.9 Andover's rental level within the town in 2006 is higher than in Eastleigh, Boscombe, Waterlooville and Gosport. Rental levels are much higher in larger competing centres i.e. Southampton, Bournemouth, Portsmouth, Basingstoke, Winchester, Salisbury and Fareham.

2.10 Prime Zone A rents in Andover are lower than in Fareham, this is in contrast to centres yields where Fareham is ranked lower than Andover. This may suggest that property investors anticipate Andover will achieve more growth in retail rents in the future when compared with Fareham.

Table 2.2: Retail Yields in Andover and Other Centres (% Yield)

Centre	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Southampton	4.75	5.0	5.0	5.0	5.0	6.0	6.0	4.5	5.0	5.0	5.0	5.0	4.0
Basingstoke	6	5.75	5.75	5.75	5.75	5.75	7.0	7.0	6.5	6.5	6.75	6.0	5.5
Salisbury	5.0	5.5	5.5	5.5	6.0	6.0	6.5	6.5	6.5	6.5	6.5	6.5	6.0
Winchester	5.0	5.0	5.0	5.0	5.0	6.0	7.5	7.5	6.75	6.75	6.75	6.0	6.0
Portsmouth	7.0	6.5	6.5	6.5	6.5	6.5	6.5	7.25	6.5	6.5	6.5	6.5	6.0
Andover	***7.0***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.5***	***7.25***	***6.25***
Bournemouth	7.5	6.0	5.5	5.5	5.5	5.75	5.5	5.5	5.75	5.5	5.5	5.5	5.0
Newbury	6.5	6.0	6.0	6.5	6.5	6.5	6.5	6.5	7.0	7.0	6.5	5.5	5.25
Eastleigh	7.0	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.25	7.25
Boscombe	11.0	8.0	8.0	8.0	8.0	7.75	8.0	8.0	8.0	8.0	8.0	8.0	7.5
Fareham	7.5	7.5	7.5	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	7.5	7.5
Shirley	9.0	9.5	10.0	10.0	10.0	10.0	10.0	10.0	=10	=10	=10	8.0	6.75

Source: Valuation Office (July 2006)

Table 2.3: Retail Rents in Andover and Other Centres (Annual Zone A Rent Per Sq M)

Centre	1987	1997	1998	1999	2000	2001	2002	2003	2004	2006
Southampton	1,076	1,991	1,991	2,045	2,529	2,422	2,422	2,691	2,960	3,444
Bournemouth	1,023	1,453	1,453	1,453	1,615	1,615	1,722	1,884	1,991	2,045
Portsmouth	915	1,184	1,507	1,722	1,722	1,615	1,668	1,722	1,884	1,938
Basingstoke	807	1,346	1,346	1,453	1,453	1,453	1,453	1,668	1,668	1,776
Winchester	969	1,076	1,292	1,292	1,292	1,292	1,399	1,453	1,453	1,615
Salisbury	646	969	1,023	1,076	1,076	1,076	1,076	1,184	1,184	1,346
Fareham	807	915	1,076	1,130	1,130	1,130	1,184	1,238	1,238	1,346
Newbury	323	969	1,023	1,023	1,023	1,023	1,076	1,076	1,184	1,238
Andover	**538**	**592**	**592**	**592**	**592**	**592**	**592**	**646**	**753**	**861**
Eastleigh	377	463	463	484	484	484	538	538	592	646
Boscombe	-	-	-	-	-	-	-	431	484	538
Waterlooville			323	377	431	484	484	484	484	484

Source: 1987-2004 figures - Colliers CRE 2005 In-Town Retail Rents. 2006 figures – Colliers CRE 2006 In-Town Retail Rents Research.

Andover and Romsey's Role

2.11 Andover is a secondary sub-regional centre below Southampton, Basingstoke and Portsmouth. As a sub-regional centre, Andover is the main shopping and commercial centre in the Borough. It has a varied role including:

- *convenience shopping* – including large food stores (Waitrose and Sainsbury) supported by specialist bakers, newsagents and an Iceland store. There is also a food hall within the Mark & Spencer store. These facilities serve both basket and bulk food shopping trips. In addition, there is a proposed new Asda store located outside of the town centre boundary;

- *comparison shopping* - a good choice of multiple and independent shops selling a range of high and lower order comparison goods. There is a good selection of multiples, many located within the covered Chantry Centre;

- *services* – including a range of high street national banks, cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours;

- *entertainment and leisure* – including a cinema, bingo, theatre and pubs/bars; and

- *community facilities* –several advice centres and health centres.

2.12 Andover might be expected to serve the whole of the Borough for comparison shopping, and has a relatively wide range of activities, but the presence of larger centres, particularly Southampton, does have an impact on the extent of its catchment area. The town centre should function as the main comparison shopping destination in the Borough, and also the main destination for leisure, entertainment and cultural activities that serve the Borough as a whole. The Council's strategy should seek to maintain and enhance Andover as a sub-regional centre. In order to maintain and enhance this role, the town centre will be the focus for major retail developments, large scale leisure and other uses that attract large numbers of people including major cultural, tourism and community facilities.

2.13 Andover has the main concentration of comparison retailing, leisure and services in the Borough. There is potential to upgrade and improve the quality of retail provision in the centre in the future. Growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within Andover, particularly within the town centre. New development could help to attract new operators not currently represented in the Borough, or could allow existing occupiers to occupy larger/better premises.

2.14 Romsey is, and is likely to continue to be, a third level centre in the hierarchy, after Southampton (first level) and Andover (second level). Romsey town centre primarily serves the day-to-day shopping and service needs of local residents within the town and a small rural catchment area. It has a number of specialist independent retailers/services and a small selection of multiple outlets. Its key roles include:

- *convenience shopping* – including a reasonably large Waitrose store supported by smaller stores (Co-op/Aldi) and small independent shops. The Waitrose store serves both basket and bulk food shopping trips;
- *comparison shopping* - a reasonable selection of multiple and independent shops selling primarily lower order comparison goods. There only a small selection of multiples;
- *services* – including high street national banks, cafés, restaurants, takeaways and hairdressers/beauty parlours;
- *entertainment and leisure* – including pubs/bars; and
- *community facilities* –such as a library and health facilities.

2.15 Romsey is an important service centre, which should be maintained and enhanced to ensure it provides an appropriate range of facilities and services for local residents. The Council's future strategy should seek to ensure Romsey town centre adequately serves the town and its rural catchment area. In order to maintain and enhance its important role, some development and expansion may be required. However, given its position below Southampton and Andover the hierarchy, the strategy should only seek development of an appropriate scale. Development in Romsey should not seek to serve residents in other towns, or rural areas outside its primary catchment area.

Socio-Economic Characteristics within Test Valley Borough

2.16 Shopping needs may vary considerably, often related to socio-economic characteristics. For example, residents without access to a car or those on low incomes will have different needs to those who are mobile by car or who enjoy higher income. Lower income groups without access to a car may be less able to travel to shopping facilities and may also be socially excluded from high priced shops, therefore, the availability of discount or value retail facilities may be important for these groups. The socio-economic characteristics of Test Valley Borough have been examined and compared with the county and national averages. Car ownership is shown in Table 2.4.

Table 2.4: Car Ownership 2001

Characteristic	% Households 2001		
	Test Valley Borough	Hampshire	UK Average
Car Ownership			
Two or more	45.2	42.4	29.4
One	40.1	42.0	43.8
None	14.7	15.7	26.8

Sources: 2001 Census of Population

2.17 Car ownership in Test Valley Borough (85.3% of households) is just above the Hampshire County average (84.4%), and is significantly above the UK average (73.2%), as shown in Table 2.4. A higher proportion of households have two or more cars in Test Valley compared with the County and UK, which may be an indication of higher levels of affluence and mobility. However, car ownership tends to be higher in rural areas compared with large towns and cities.

2.18 Test Valley has a high proportion of economically active adults in employment as shown in Table 2.5. The proportion is slightly higher than the County average and significantly higher than the National average. The unemployment rate is comparable with the County average and lower than the National average.

2.19 The high proportion of economically active adults is reflected by the low proportion of students, retired and inactive adults. The proportion of retired residents is slightly lower than both the County and the National averages. The proportion of residents looking after home/family is comparable with both the national and county averages.

Table 2.5: Economic Activity 2001

Status	% People aged 16-74		
	Test Valley Borough	Hampshire	UK Average
Employed	70.2	67.5	60.2
Unemployed	1.5	1.9	3.4
Looking after home/family	6.1	6.2	6.4
Students	4.7	5.4	7.3
Retired	12.7	13.9	13.6
Other inactive	4.8	5.1	9.0

Sources: 2001 Census of Population

2.20 The age structure in Test Valley Borough varies slightly from the County and National averages. Test Valley Borough has a slightly lower proportion of adults aged 15 to 29 compared with the County and National average.

Table 2.6: Age Structure 2001

Status	% of Population 2001		
	Test Valley Borough	**Hampshire**	**UK Average**
Children 0-14	19.7	18.9	18.9
Adults 15 to 29	15.8	17.0	18.8
Adults 30 to 44	23.4	22.8	22.6
Adults 45 to 59	21.1	20.2	19.0
Adults 60 to 74	12.9	13.5	13.3
Adults 75 +	7.1	7.7	7.5

Sources: 2001 Census of Population

2.21 The proportions of children aged 0 to 14 and adults aged 30 to 44 are slightly higher than the National and County averages. The proportions of adults aged 60 to 74, and aged over 75 are comparable with both the County and national averages, as shown in Table 2.6.

2.22 Test Valley Borough has a similar ethnic mix when compared with the County average, both of which have a much lower proportion of ethnic minorities than the average for England, as shown in Table 2.7.

Table 2.7: Ethnic Groups 2001

Status	% of Population 2001		
	Test Valley Borough	**Hampshire**	**England Average**
White	97.9	97.8	90.9
Mixed	0.7	0.7	1.3
Asian	0.7	0.7	4.6
Black/Black British	0.2	0.3	2.3
Other	0.6	0.5	0.9

Sources: 2001 Census of Population

2.23 This socio-economic analysis indicates that the profile of residents is similar to the profile of residents in the rest of Hampshire. There are differences between the profile of residents in Test Valley Borough and the UK as a whole. Test Valley Borough has higher levels of car ownership than the national average and lower unemployment. These characteristics suggest that many households in Test Valley

Borough are relatively mobile and have the ability to travel for shopping and leisure purposes.

3.0 THE NEED FOR NEW RETAIL DEVELOPMENT

Introduction

3.1 This section assesses the quantitative and qualitative scope for new retail floorspace in Test Valley in the period from 2006 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. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken.

3.2 All monetary values expressed in this analysis are at 2005 prices, consistent with Experian's base year expenditure figures for 2005. Expenditure data for 2006 is not currently available and 2005 is the most up to date information.

Methodology and Data

3.3 The quantitative analysis is based on a study area defined for the two main shopping centres within the Borough, i.e. Andover and Romsey. The study area has been divided into 14 zones or sectors (1 to 14) for more detailed analysis.

3.4 The study area is shown in Appendix A. The extent of the study area is based on the study area adopted in Colliers Erdman Lewis's Retail Study (1998). The study area is based on postal sectors and includes all of the Borough and extends further out to include the surrounding rural areas. The catchment area zones remain an appropriate catchment area for the town in Test Valley.

3.5 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 local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2005 have been obtained.

3.6 Experian's latest national expenditure projections between 2005 and 2026 have been used to forecast expenditure within the study area. Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric 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 value. The model incorporates assumptions about income and price elasticities.

3.7 Experian provides recommended growth rates for the period 2005 to 2010 and 2011 to 2015. The recommended growth rates for the period 2005 and 2010 are 0.5% per annum for convenience goods and 4.3% per annum for comparison goods. These growth rates have been used in this study to forecast expenditure per capita up to 2010. Adjusted growth rates (0.9% and 3.3% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2010 and 2015, consistent with Experian's overall growth forecasts for 2005 to 2015. Growth in expenditure between 2015 and 2026 is based on 0.7% and 3.8% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2005 to 2026.

3.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the Borough (i.e. Andover, Romsey and Stockbridge). The penetration rates (or market shares) adopted in this study for 2006 (the base year) are based on the penetration rates used in the Colliers Erdman Lewis (1998) report, with adjustments for comparison shopping to reflect major new developments in Basingstoke (Festival Place) and Southampton (West Quay), which have been implemented since 1998. The amount of comparison expenditure attracted to the Borough has been reduced in zones 5, 10, 11, 12, 13 and 14, in the south and north east of the study area.

3.9 The future penetrations rates for convenience shopping adopts the 1998 rates for the 2006 base year, but these rates have been adjusted to reflect the proposed Asda store due to open in Andover and the Tesco store due to open in Tidworth. The penetration rates for comparison shopping facilities remain constant throughout the time period.

3.10 The total turnover of shops within the study area is estimated based on expected penetration rates within each study area zone. These turnover estimates are converted into average turnover to sales floorspace densities. Turnover densities are compared with company average turnover to sales floorspace densities and benchmark turnover levels in order to identify potential surplus expenditure capacity or deficit.

Population and Spending

3.11 The study area population for 2001 to 2026 is set out in Table 1B in Appendix B, based on the 2001 Census and Hampshire, West Berkshire and Wiltshire County Council projections up to 2026. Population within the study area is expected to increase between 2001 and 2026 by about 10%. Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area. Comparison forecasts of per capita spending are shown in Table 1C.

3.12 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

3.13 Special Forms of Trading (SFT) and non-store activity is included within Experian's goods based expenditure 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.

3.14 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. Experian has attempted to provide projections for special forms of trading and E-tailing (Retail Planner Briefing Note 2.3D – December 2005).

3.15 This latest Experian information (2005 figure) suggests that non-store retail sales is:

- 2.9% of convenience goods expenditure; and
- 6.3% of comparison goods expenditure.

3.16 For convenience expenditure 2.1% of the 2.9% is estimated to be E-tailing, and the rest 0.8% is other forms of SFT e.g. mail order. E-tailing in 2004 can be broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (0.5%). Therefore the E-tailing split for retail and non-retail businesses is approximately 70:30.

3.17 For comparison expenditure in 2005, 4% of the 6.3% is estimated to be E-tailing, and the rest 2.3% is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) is 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. Therefore the E-tailing split for retail and non-retail businesses is approximately 40:60.

3.18 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. Experian estimate that SFT (including non-retail e-tailing) was 1.6% and 5.4% of total convenience and comparison goods expenditure respectively. The mid-point of the range of projections provided by Experian suggests that these percentages could increase to 2.3% and 7.8% by 2011 respectively. Therefore 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. NLP estimate that SFT is 1.8% and 6.0% of total convenience and comparison goods expenditure respectively in 2006, rising to 2.3% for convenience goods expenditure and 7.8% for comparison goods expenditure in 2011 and beyond.

3.19 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 22.1% from £518.54 million in 2006 to £633.28 million in 2026, as shown in Table 3B.

3.20 Comparison goods spending is forecast to increase by 117.6% from £947 million in 2006 to £2,060 million in 2026, as shown in Table 2C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

3.21 Existing convenience goods retail sales floorspace within Andover, Romsey and Stockbridge is 15,302 sq m net as set out in Table 1A, Appendix A. This floorspace figures includes comparison sales floorspace within food stores (1,322 sq m net within the Borough).

3.22 Comparison goods retail floorspace within Andover and Romsey, including retail warehouses in Andover and at Nursling Estate Retail Park is 53,010 sq m net, as shown in Tables 2A and 3A, Appendix A. This figure includes comparison sales floorspace within large food stores (1,322 sq m net).

Existing Spending Patterns 2006

Convenience Shopping

3.23 Estimates of existing shopping patterns within the study area i.e. the estimates of market share or penetration rates within each study area zone are based on those adopted in the Collier Erdman Lewis study (1998), as shown in Table 4B, Appendix B. Available expenditure within Andover and Romsey at 2006, based on these market shares is shown in Table 5B, Appendix B. These market shares have been adjusted for future years to allow for major food store commitments which are shown in Table 4A, Appendix A. The adjusted future market shares are shown in Table 6B, Appendix B.

3.24 The level of convenience goods expenditure attracted to shops/stores in Test Valley Borough in 2006 is estimated to be £169.18 million as shown in Table 5B, Appendix B. Test Valley attracts about 33% of total convenience expenditure available within the study area as a whole, based on the household survey/market penetration rates adopted in the Collier Erdman Lewis study (1998). Therefore, around 67% of convenience goods expenditure is estimated to be spent outside the Test Valley Borough. However according to the Collier Erdman Lewis study, expenditure leakage varies within different parts of the study area. Expenditure leakage is estimated to be highest (96%) in the Totton zone of the study area (Zone 14) and is also high (94%) in the Alderbury zone (Zone 7), (92%) in the Southampton Suburbs zone (Zone 13), and (90%) in the Chandlers Ford zone (Zone 9). Many residents within these zones have good access to large food stores in Totton, Winchester, Southampton and Salisbury. There is also a reasonable level of leakage from other study areas zones, i.e. Zone 10/11 (Romsey) with 57% leakage and zone 13 (North Baddesley) with 68% leakage.

3.25 Company average turnover to sales floorspace densities are available for major food store operators. 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, 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 helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

3.26 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed an average sales density for small convenience shops in Andover and Romsey of £5,000 per sq m net and an average sales density for small convenience shops in Stockbridge of £4,000 per sq m net. The total benchmark turnover of existing convenience sales floorspace within the Borough is £125.41 million.

3.27 Our assessment suggests convenience goods expenditure attracted to the Borough in 2006 is £169.18 million, including £5.22 million attracted to local shops. Convenience floorspace within Test Valley is collectively trading about 30% above the benchmark turnover, +£38.56 million. However there are significant variations in the trading performance of stores and areas within the Borough. The estimates of available expenditure are summarised and compared with the benchmark turnover in Table 3.1.

Table 3.1: Convenience Trading Levels in 2006 (£ millions)

Centres	**Available Expenditure**	**Benchmark Turnover**	**Difference**
Andover	127.36	93.40	+33.96
Romsey	35.27	30.60	+4.67
Stockbridge	1.33	1.40	-0.07
Local Shops	5.22	N/A	N/A
TOTAL	**169.18**	**125.4**	**+38.56**

Source: Table 1A (Appendix A) and Table 5B (Appendix B)

Comparison Shopping

3.28 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £208.35 million in 2006, as shown in Table 3C, Appendix C. This expenditure figure is based on data from Experian and the market shares from the Colliers Erdman Lewis study (1998). Test Valley attracts about 22% of total comparison expenditure available within the study area as a whole. Therefore, around 78% of comparison goods expenditure is estimated to be spent outside the Test Valley Borough. Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (53,010 sq m net) is £3,930 per sq m net.

3.29 Company average sales densities are only available for most retail warehouse operators and a smaller selection of high street multiple retailers. Available information indicates that sales densities amongst comparison retailers vary significantly. Mintel's Retail Rankings 2006 company average sales density information for retail warehouse operators has been adopted to estimate the benchmark turnover of retail warehouses in the Borough as shown in Table 3A Appendix A. The benchmark turnover for retail warehouses is £67.75 million, with an average sales density of £2,410 per sq m net.

3.30 For high street comparison retailers sales density information is more limited. However available data for a selection of national high street retailers has been used to provide a notional average sales density for all high street comparison retailer (£5,389 per sq m), as shown in Table 5A in Appendix A. Based on our recent experience across the country average sales densities for comparison floorspace within town centres can range from £3,000 to £7,000 per sq m net, and the implied Mintel average is broadly in the middle of this range. The higher end of this range is usually only achieved by very successful shopping centres, which reflects the higher proportion of quality multiple retailers. The appropriate average for a centre is also affected by the amount of primary and secondary floorspace and the balance between multiple retailers and small independent traders. We have assumed an average turnover of £5,000 per sq m for High Street comparison shops in Andover and Romsey town centres, i.e. a figure broadly in the middle of the expected range and similar to that shown in Table 5A.

3.31 Overall the benchmark turnover of existing comparison retail sales floorspace within the Borough is £194.06 million. Our assessment suggests comparison goods expenditure attracted to the Borough in 2006 is £208.35 million, including £1.60 million attracted to shops in Stockbridge. The estimates of available expenditure are summarised and compared with the benchmark turnover in Table 3.2.

Table 3.2: Comparison Trading Levels in 2006 (£ millions)

Centres	**Available Expenditure**	**Benchmark Turnover**	**Difference**
Andover	138.12	137.89	+0.24
Romsey	46.99	38.22	+8.77
Nursling Retail Park	21.64	17.96	+3.67
Stockbridge	1.60	n/a	n/a
TOTAL	**208.35**	**194.06**	**+12.68**

Source: Tables 2A and 3A (Appendix A) and Table 3C (Appendix C)

3.32 Comparison floorspace within Test Valley is collectively trading about 6% above the benchmark turnover, +£12.68 million. Retail floorspace within Romsey appears to be trading particularly healthily, 23% above the adopted benchmark turnover. Romsey has 7,499 sq net of comparison sales floorspace, which is expected to have a benchmark turnover of £38.22 million (an average of £5,073 per sq m net). The household survey results suggest the actual comparison turnover of floorspace in Romsey is £46.99 million, an average sales density of £6,266 per sq m. Based on our experience across the country this is a relatively high average turnover for a small town centre.

Quantitative Capacity for Additional Convenience Floorspace

3.33 The level of available convenience goods expenditure in 2011, 2016, 2021 and 2026 is shown at Tables 7B to 10B in Appendix B, and summarised in Table 11B.

3.34 The total level of convenience goods expenditure available for shops in Test Valley between 2006 and 2026 is summarised in Table 3.3. This table takes into account the commitments and projected future shares as shown in Table 4A and 6B in Appendices A and B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown in Table 11B, Appendix B.

Table 3.3: Convenience Expenditure/Floorspace Projections

	2006 to 2011	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Total available expenditure £M	172.85	183.51	193.44	202.45
Turnover of facilities/Commitments £M	176.52	179.18	181.89	184.63
Surplus expenditure £M	**-3.67**	**4.33**	**11.55**	**17.82**
Sales Floorspace SQ M Net				
Andover	-983	-442	130	613
Romsey	572	871	1,031	1,162
Stockbridge	-7	-14	-3	4
Local Centres/Shops	20	85	129	168
Total Sales Floorspace (SQ M Net)	**-397**	**499**	**1,287**	**1,947**

Source: Appendix B Table 15B

3.35 The floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. Table 3.3 assumes that the benchmark sales density of future new floorspace in Andover and Romsey will be in line with existing convenience floorspace within Borough (£8,971 per sq m net). A figure of £5,000 per sq m net is adopted for local shops. The turnover density is projected to increase in real terms in the future, an increase of 0.3% per annum is adopted. PPS6 indicates that retail studies should assess the potential for existing floorspace to increase its productivity in the future.

3.36 Historically, limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. However, recent information published by Experian recommends a growth rate of 0.75% per annum for convenience businesses. This growth rate is a combined figure for both food and non-food floorspace within food stores. Experian's recommended growth rate for comparison floorspace (non-food) is much higher than for convenience floorspace, i.e. between 2% to 2.5%. If Experian's higher growth rate for comparison floorspace (2% to 2.5%) is adopted for comparison floorspace within food stores then it follows that the appropriate growth rate for convenience sales floorspace only will be much lower than 0.75%. On this basis, we believe that a growth rate of 0.3% is appropriate for convenience sales floorspace only.

3.37 At 2016, estimated convenience expenditure is projected to exceed the benchmark turnover of existing and proposed facilities in the Borough by £4.33 million. The figures suggest that proposed commitments (i.e. Asda in Andover) will absorb future expenditure growth up to and beyond 2011. The small surplus expenditure estimate at 2016 is not capable of supporting a new large food store, but could support extensions to existing stores or small stores/shops. This surplus expenditure figure is over and above the Asda store commitments at Andover.

3.38 The floorspace projections in Table 3.3 assume that the leakage of convenience expenditure from Romsey's local catchment area (Zones 8, 10, 11 and 12) will remain reasonably high in the future. At present Romsey attracts just over 36% of convenience expenditure, within the local catchment area. If a large new food store was developed within Romsey then this market share could increase. If for example the market share within Zones 8 to 12 was increased to 50%, then the following convenience sales floorspace could be accommodated:

- 2006 to 2011 = 1,433 sq m net;
- 2006 to 2016 = 1,803 sq m net;
- 2006 to 2021 = 2,003 sq m net; and
- 2006 to 2026 = 2,165 sq m net.

3.39 These figures suggest that a reasonable size new food store (1,400 sq m net plus) could be accommodated in Romsey in the short to medium term. However, the ability on any food store proposal to claw back expenditure leakage and the potential impact on existing facilities within Romsey would need to be carefully considered.

Quantitative Capacity for Additional Comparison Floorspace

3.40 The assessment of existing shopping patterns in 2006 indicates that there is a high level of comparison expenditure leakage from across the Borough and the wider study area. One would expect comparison expenditure outflow to continue to large centres including Basingstoke, Southampton, Salisbury and Winchester.

3.41 Major retail development in the Borough could change existing shopping patterns and could reduce comparison expenditure leakage. Conversely improvements to comparison retailing in competing centres may increase expenditure leakage from the study area. Development in competing towns, for example emerging proposals in Portsmouth for the City Centre North redevelopment by Centros Miller, Hammerson's proposals in Southampton and Thornfield's development proposals in Winchester, will limit the ability of shopping facilities in Test Valley to increase their market share of expenditure. We have projected the level of comparison goods expenditure available to shops in Test Valley at 2011, 2016, 2021 and 2026 as shown in Tables 4C to 7C in Appendix C, based on the maintenance of existing 2006 penetration rates.

3.42 The growth in comparison goods expenditure available for shops in Test Valley between 2006 and 2026) is summarised in Table 8C, in Appendix C. Future available expenditure is compared with the turnover of existing retail facilities within the Borough in order to provide estimates of surplus expenditure in Table 3.4.

Table 3.4: Comparison Expenditure/Floorspace Projections

	2006 to 2011	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Total Available Expenditure £M	253.68	306.31	375.75	456.69
Turnover of Existing Facilities £ M	210.79	227.08	244.63	263.53
Turnover of commitments £M	10.17	10.96	11.80	12.71
Surplus Expenditure £ M	**32.72**	**68.27**	**119.32**	**180.44**
Turnover Density £ Per Sq M Net	5,386	5,803	6,251	6,734
Sales Floorspace Sq M Net				
Andover	1,757	5,186	10,034	15,275
Romsey	2,965	4,555	6,233	7,958
Nursling Retail Park	1,310	1,968	2,712	3,398
Stockbridge	42	56	110	164
Total Sales Floorspace (SQ M Net)	**6,074**	**11,765**	**19,089**	**26,795**
Gross Floorspace Sq M*				
Andover	2,343	6,915	13,378	20,367
Romsey	3,953	6,073	8,310	10,611
Nursling Retail Park	1,747	2,624	3,616	4,530
Stockbridge	56	75	146	218
Total Gross Floorspace Sq M	**8,099**	**15,688**	**25,449**	**35,726**

Source: Appendix C, Table 8C

* 75% net to gross floorspace.

3.43 This table takes into account the population and expenditure projections shown in Table 1B, 1C and 3C in Appendix B and C. The turnover of the non-food element of proposed commitments in Andover (Asda) has been subtracted. Surplus comparison expenditure has been converted into potential new floorspace, based on an average sales density of £5,000 per sq m net at 2006 inflated at 1.5% per annum).

3.44 Table 3.4 assumes that surplus expenditure will be accommodated within high street comparison shops, with a relatively high sales density (£5,000 per sq m net at 2006). However, some forms of retailing may not be capable of being accommodated within high street shop units, and large format stores/retail warehouse units may be required. Retailers selling goods such as DIY/gardening items, large electrical goods, furniture and floor coverings often occupy retail warehouse premises. We would normally expect retail warehouses to account for about 20% of comparison retail expenditure based on the mix of retail facilities across the country. If about 20% of the surplus expenditure available in Andover and Romsey, identified in Table 3.4, was accommodated in retail warehouse type accommodation, then the floorspace in Table 3.5 may be appropriate for the Borough. This table excludes surplus expenditure relating to Nursling Retail Park, because this facility primarily serves residential areas outside the Borough.

Table 3.5: High Street and Retail Warehouse Floorspace Projections

	2006 to 2011	2006 to 2016	2006 to 2021	2006 to 2026
Surplus Expenditure £ M	**25.66**	**56.85**	**102.36**	**157.56**
High Street Comparison Shops	20.57	45.55	82.03	126.27
Retail Warehouses	5.09	11.31	20.34	31.29
Turnover Density £ Per Sq M Net				
High Street Comparison Shops	5,386	5,803	6,251	6,734
Retail Warehouses	2,693	2,901	3,126	3,637
Sales Floorspace Sq M Net				
Andover High Street Comparison Shops	1,406	4,149	8,027	12,220
Andover Retail Warehouses	703	2,075	4,013	5,657
Romsey High Street Comparison Shops	2,372	3,644	4,986	6,367
Romsey Retail Warehouses	1,186	1,822	2,493	2,947
Stockbridge	42	56	109	164
Total	**5,708**	**11,746**	**19,627**	**27,354**
Gross Floorspace Sq M*				
Andover High Street Comparison Shops	1,875	5,532	10,702	16,293
Andover Retail Warehouses	827	2,441	4,721	6,655
Romsey High Street Comparison Shops	3,162	4,859	6,648	8,489
Romsey Retail Warehouses	1,395	2,144	2,932	3,467
Stockbridge	56	75	146	218
Total	**7,315**	**15,051**	**25,149**	**35,123**

* 75% net to gross floorspace for high street shops and 85% for retail warehouses

3.45 Tables 3.4 and 3.5 assumes that the benchmark turnover of existing and new comparison floorspace within the Borough will increase in real terms in the future, an increase of 1.5% per annum. Historically a growth rate of between 1% to 1.5% per annum has been widely adopted by retail planners. 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. Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs, and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision. Recent information provided by Experian recommends a slightly higher growth rate of between 2% to 2.5%. However, we believe this recommended range of rates is too high, primarily for the following reasons:

- Experian's growth rate is based on past trends during the period 1986 to 1999. During this period comparison expenditure grew rapidly (5.8% per annum). The forecast rate of growth in comparison expenditure adopted in this study is much lower (about 3.8%). Growth in turnover efficiencies and expenditure growth are inextricably linked, therefore it is unlikely that the Experian recommended growth in turnover efficiencies (2% and 2.5%) will be experienced if future growth in expenditure is only 3.8% per annum.

- an element of the past growth in turnover efficiency between 1986 and 1999 will have related to a qualitative improvement in the overall stock of retail floorspace, i.e. the development of modern shopping centres and out-of-centre stores. As a result it would wrong to assume that existing retail floorspace in Test Valley can increase its turnover efficiency at the same rate as suggested by national figures.

- Experian's growth rate is based on gross floorspace rather than net sales. Therefore, an element of the past growth in turnover density will relate to improvements in net to gross ratios, particularly reductions in storage space. It does not follow that improvements to net to gross ratio will continue at the same rate in the future.

3.46 Furthermore existing comparison sales floorspace in the Borough appears to be trading healthily with a relatively high turnover density. For these reasons we have adopted a turnover efficiency of 1.5% per annum, slightly lower than the range recommended by Experian, and consistent with the top end of the range historically adopted by retail planners.

Potential Implications of Draft South East Regional Spatial Strategy

3.47 The draft South East Plan includes proposals for higher growth in Test Valley. Test Valley North, which includes Andover, is expected to accommodate a significant housing development, 5,000 new dwellings between 2006-2016. Southern Test Valley, which includes Romsey, is expected to accommodate 3,910 dwellings between 2006-2016. The plan includes provisional phasing for this development within five year periods of the plan as shown in Table 3.6 below.

Table 3.6: Provisional Phasing of Housing Development

Town	Total	2006-2011	2011-2016	2016-2021	2021-2026
Andover	**5,000**	3,100	633	633	633
Romsey	**3,910**	650	1,375	1,375	510

Source: Test Valley Borough Council

3.48 These new dwellings have not been taken into account within Hampshire County Council's population projections. Therefore, the population projections in Table 1B Appendix B will under-estimate population growth if these South East Plan proposals are implemented.

3.49 In order to assess the potential implications of the South East Plan housing projections, the retail capacity assessment has been reworked with higher population growth for the Andover and Romsey urban areas. Additional population has been added to Zones 3, 4, 10 and 11, based on the phasing shown in table 3.5 and assuming for 2.3 people per dwelling. Revised convenience and comparison retail floorspace projections, based on this higher population growth, are shown in Tables 3.7 and 3.8 below.

Table 3.7: Revised Convenience Expenditure/Floorspace Projections

	2006 to 2011	2006 to 2016	2006 to 2021	2006 to 2026
Total available expenditure £M	184.47	200.25	215.55	228.70
Turnover of facilities/Commitments £M	176.52	179.18	181.89	184.63
Surplus expenditure £M	**7.96**	**21.07**	**33.67**	**44.07**
Sales Floorspace SQ M Net				
Andover	146	956	1,798	2,562
Romsey	684	1,229	1,645	1,882
Stockbridge	-7	-14	-3	4
Local Centres/Shops	85	183	263	325
Total Sales Floorspace (SQ M Net)	**908**	**2,354**	**3,703**	**4,773**

Table 3.8: Revised Comparison Expenditure/Floorspace Projections

	2006 to 2011	2006 to 2016	2006 to 2021	2006 to 2026
Total Available Expenditure £M	267.69	331.96	417.65	514.61
Turnover of Existing Facilities £ M	210.79	227.08	244.63	263.53
Turnover of commitments £M	10.17	10.96	11.80	12.71
Surplus Expenditure £ M	**46.73**	**93.93**	**161.22**	**238.36**
Turnover Density £ Per Sq M Net	5,386	5,803	6,251	6,734
Sales Floorspace Sq M Net				
Andover	3,887	7,997	13,710	19,984
Romsey	3,323	5,781	8,534	10,919
Nursling Retail Park	1,424	2,354	3,436	4,328
Stockbridge	42	56	110	164
Total Sales Floorspace (SQ M Net)	**8,676**	**16,188**	**25,790**	**35,395**
Gross Floorspace Sq M*				
Andover	5,182	10,662	18,280	26,645
Romsey	4,431	7,708	11,379	14,559
Nursling Retail Park	1,898	3,138	4,581	5,771
Stockbridge	56	75	146	218
Total Gross Floorspace Sq M	**11,568**	**21,583**	**34,386**	**47,194**

* 75% net to gross floorspace.

3.50 If implemented the additional population will not significantly increase the requirement for convenience floorspace in the short term (up to 2011). There could be scope for medium sized food stores (about 1,000 to 1,200 sq m net) in Andover and Romsey by 2016, which could be provided within neighbourhood centres serving the proposed new residential areas. Some of the projected floorspace could be incorporated by the new developments which are proposed at East Anton and Picket Twenty, to meet the need for Major Development Areas in Andover (See section 5, Local Planning Context below).

3.51 The additional population will increase the capacity for comparison floorspace. The projected comparison floorspace requirement would increase from 8,099 sq m gross to 11,568 sq m gross by 2011, and from 15,688 sq m gross to 21,583 sq m gross by 2016, as shown by Table 3.8 above.

3.52 If 20% of the surplus expenditure identified in Table 3.8 was accommodated in retail warehouse type accommodation, then the floorspace in Table 3.9 may be appropriate for the Borough.

Table 3.9: Revised High Street/Retail Warehouse Floorspace Projections

	2006 to 2011	2006 to 2016	2006 to 2021	2006 to 2026
Surplus Expenditure £ M	**39.06**	**80.27**	**139.74**	**209.21**
High Street Comparison Shops	31.30	64.28	111.93	167.59
Retail Warehouses	7.77	15.99	27.81	41.62
Turnover Density £ Per Sq M Net				
High Street Comparison Shops	5,386	5,803	6,251	6,734
Retail Warehouses	2,693	2,901	3,126	3,637
Sales Floorspace Sq M Net				
Andover High Street Comparison Shops	3,109	6,397	10,968	15,987
Andover Retail Warehouses	1,555	3,199	5,483	7,400
Romsey High Street Comparison Shops	2,659	4,625	6,828	8,736
Romsey Retail Warehouses	1,330	2,313	3,413	4,044
Stockbridge	42	56	109	164
Total	**8,695**	**16,590**	**26,802**	**36,330**
Gross Floorspace Sq M*				
Andover High Street Comparison Shops	4,146	8,530	14,624	21,316
Andover Retail Warehouses	1,829	3,764	6,451	8,706
Romsey High Street Comparison Shops	3,545	6,166	9,104	11,648
Romsey Retail Warehouses	1,564	2,721	4,016	4,757
Stockbridge	56	75	146	218
Total	**11,140**	**21,255**	**34,340**	**46,645**

* 75% net to gross floorspace for high street shops and 85% for retail warehouses

The Qualitative Need for Retail Development

New Forms of Retailing

3.53 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. For example, factory outlet centres have been developed across the country as an alternative to fashion shops within town centres. These developments are usually large and can provide over 10,000 sq m of comparison retailing, focusing primarily on fashion items and clothing, offering designer clothing at discounted prices. A number of large factory outlet developments have emerged across Great Britain and draw from a wide catchment area.

3.54 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 Test Valley. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

3.55 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as *"special forms of trading"*, as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need for retail floorspace.

3.56 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.

3.57 This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.58 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. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Verdict Research suggests that online retail sales could account for about 6.8% of total retail sales by 2010, which is consistent with Experian's projections. However, if this growth is achieved it may (to a large extent) be at the expense of other forms of home shopping such as catalogue and mail order shopping. In addition the implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

3.59 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. For example, 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.

3.60 Food store operators have also commenced 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.

3.61 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 their stores. Other traditional high street retailers have sought large 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. These trends have already been evident across the Country.

3.62 Within town centres, some high street multiple comparison retailers have also 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 may also influence future operator requirements in Test Valley.

Food and Grocery Shopping

3.63 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a *main* shopping trip generally made once a week or less often and *top-up* shopping trips made more frequently. Many households will also undertake bulk food shopping trips, particularly households who have access to a car for shopping. The availability of a wide range of products and free surface level car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as 2,500 sq m net or more in PPS6, are the usual destination for these types of shopping trip.

3.64 There is currently only one food superstore (over 2,500 sq m net) in the Borough, i.e. Tesco in Andover). This store is supported by four other reasonably large (1,200 to 1,600 sq m net) food stores. The proposed Asda store under construction in Andover will be a superstore and will increase choice in Andover. In Romsey the Waitrose store is a reasonably large store (1,932 sq m net) with a good range of products. Residents in Romsey's catchment area also have reasonably good access to large food stores in Eastleigh, Totton and Southampton.

3.65 The large food stores in the Borough are supported by a good range of smaller supermarkets and convenience stores, as shown in Table 1A. There are two discount food retailers within the Borough, a Lidl in Andover, and an Aldi in Romsey. There are also a number of small supermarkets in the Borough, for example, a number of Co-op stores, and a Tesco Express and Marks and Spencer food hall in Andover. Food stores within the Borough are supported by a number of small independent convenience shops located within the local centres.

High Street Comparison Shopping

3.66 Andover and Romsey town centres are the main high street comparison shopping destination in the Borough. Both town centres provide a reasonable range of comparison shops including a selection of national multiples and independent specialists. However, Andover, being the much larger centre, has a more extensive range of comparison shops than Romsey, and in particular has significantly more national multiples. As indicated in Section 3, Andover and Romsey are positioned below other centres in the shopping hierarchy in the sub-region. Although Andover is positioned above Romsey, there are still a number of surrounding centres ranked above it in terms of multiple retailer representation including Southampton, Basingstoke, Salisbury and Portsmouth. These competing centres along with the major centres of Winchester and Newbury are easily accessible to residents within Test Valley.

3.67 Residents within the Borough have a good choice of high street comparison shopping destinations. Residents in the north of the Borough have good access to Basingstoke and Newbury, residents in the south of the Borough have good access to Southampton. Salisbury and Winchester are also easily accessible to residents in both the north and south of the Borough.

Large Format Stores/Retail Warehouses

3.68 There are currently a wide range of retail warehouses in Andover, serving the northern half of the Borough. Andover has three retail parks selling a good range of bulky goods. There is also a retail park in Nursling in the south of the Borough, which serves the Totton area and the north west of Southampton. Together these retail parks provide sixteen retail warehouses, encompassing a wide range of bulky comparison goods, as shown in Table 3A, Appendix A. The total floorspace of the retail warehouses is about 33,000 sq m gross.

4.0 RECOMMENDATIONS

Retail Capacity Projections

4.1 This report provides a borough wide needs assessment for retail uses in Test Valley. It provides a guide to the shopping needs of the Borough up to 2011, 2016, 2021 and 2026. The principal conclusions of the analysis contained within this study are summarised below.

4.2 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous section suggests that there is scope for new comparison retail development within Test Valley, over and above existing commitments. It also suggests that there is some limited scope for convenience retail development, particularly after 2016. However, there is limit scope for new convenience retail development in Andover for the foreseeable future.

4.3 Growth in expenditure should provide opportunities to improve the range and quality of shopping facilities within the Borough. Taking account of existing commitments there is still a potential need for additional comparison shopping facilities in the Borough in the short to medium term (up to 2011 and 2016). In line with policy in PPS6, future development plans should seek to identify opportunities to accommodate growth, at least for the next five years. In our view the Council should seek to identify sites to accommodate the projections up to 2016. Longer term growth up to 2021 and 2026 should be monitored and updated as necessary.

4.4 The floorspace projections should not be considered to be maximum/minimum limits or targets, particularly when translated into the development plan allocations or when used to guide development control decisions. A major town centre scheme could come forward in the period to 2011, although the implementation of proposals may possibly result in an over-supply of comparison floorspace. Such floorspace limits 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.

4.5 Long term forecasts (beyond 2016) 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 short to medium term growth projections. 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 the Borough and competing centres should also be monitored and the affects proposals may have on the demand for additional development in Test Valley should be considered carefully.

Convenience Development

4.6 On the basis of the assumption that existing convenience retailers trade at reasonable average turnover levels, the quantitative capacity analysis indicates that there is some limited potential for further convenience goods sales floorspace within the Borough, as shown in Table 4.1 below. There is limited scope to accommodate additional floorspace in Andover for the foreseeable future. In Romsey there may be scope for small scale development i.e. small stores or extensions to existing stores before 2016. However, if the Romsey can claw back a significant element of the convenience expenditure leakage from its local catchment area (without having an adverse impact on existing facilities) then there may be scope for a new food store of at least 1,400 sq m net by 2011.

4.7 Furthermore, if the proposed RSS housing developments are implemented there may be scope for medium sized food stores in Andover and Romsey by 2016. It is worth noting that Romsey town centre is severely limited in terms of additional retail floorspace in the town centre, and so if the projected floorspace is to be accommodated then it is likely that it would have to be on an out-of-centre site, or as part of a major new residential development.

Table 4.1: Convenience Sales Floorspace Projections

Scenario 1 – No RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	-983	-442	130	613
Romsey	572	871	1,031	1,162
Other local	13	69	126	172
Scenario 2 – With RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	146	956	1,798	2,562
Romsey	684	1,229	1,645	1,882
Other local	68	169	260	329

Comparison Development

4.8 The quantitative capacity analysis indicates that there is more potential for new comparison goods sales floorspace within the Borough, as shown in Table 4.2, due to higher growth in expenditure per capita. There is reasonable scope for potential development in both Andover and Romsey up to 2016 if suitable opportunities are available, even without the RSS housing growth, which suggests major developments could be promoted in both town centres over the next decade, if suitable opportunities are available. The projection for Romsey at 2011 is higher than the Andover projection, due to an existing (2006) £8.77 million expenditure surplus in Romsey and the implementation of the Asda commitment in Andover, which will absorb growth. As mentioned above, Romsey is severely limited in the amount of additional floorspace it can provide in the town centre; it also suffers a lack of available suitable edge-of-centre land for new developments.

Table 4.2: Comparison Sales Floorspace Projections (assuming high street shop floorspace only)

Scenario 1 – No RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	1,757	5,186	10,034	15,275
Romsey	2,965	4,555	6,233	7,958
Scenario 2 – With RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover	3,887	7,997	13,710	19,984
Romsey	3,323	5,781	8,534	10,919

Table 4.3: Comparison Sales Floorspace Projections (assuming high street shop and retail warehouse floorspace)

Scenario 1 – No RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover – High Street	1,406	4,149	8,027	12,220
Andover – Retail Warehouse	703	2,075	4,013	5,657
Romsey – High Street	2,372	3,644	4,986	6,367
Romsey – Retail Warehouses	1,186	1,822	2,493	2,947
Scenario 2 – With RSS Housing	**2006 to 2011**	**2006 to 2016**	**2006 to 2021**	**2006 to 2026**
Projected Sales Floorspace SQ M Net				
Andover – High Street	3,109	6,397	10,968	15,987
Andover – Retail Warehouse	1,555	3,199	5,483	7,400
Romsey – High Street	2,659	4,625	6,828	8,736
Romsey – Retail Warehouses	1,330	2,313	3,413	4,044

Accommodating Growth

4.9 The floorspace projections set out in the previous sections assume that shopping facilities within Test Valley can maintain their current role within the sub-region. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres, such as Winchester and Southampton;
- the re-occupation of vacant town centre floorspace;
- the reliability of long term expenditure projections, particularly after 2016;
- the effect of Internet/home shopping on the demand for retail property;
- the acceptability of higher than average trading levels;
- the level of operator demand for floorspace in Test Valley, bearing in mind the proximity of larger centres (Southampton and Basingstoke);
- the likelihood that Test Valley's existing market share of expenditure will be maintained in the future;
- the potential impact new development may have on existing centres.

4.10 The expenditure projections in this study take into account home shopping, because *special forms of trading* has 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 impact of home shopping on expenditure projections is uncertain.

4.11 The sequential approach suggests that town centre sites should be the first choice for retail development. In Test Valley the preferred location for retail development will be Andover and Romsey town centres, particularly for major development which has more than a local catchment area. Some forms of retail facilities which serve more localised catchment areas may be more appropriate within local centres, such as

Stockbridge. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

4.12 Any major comparison retail proposals outside designated centres (town and local) will be required to comply with the sequential approach to site selection, and the applicant will also need to demonstrate the proposal will not have an unacceptable impact on existing centres. Development within centres will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves.

4.13 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 1.5% per annum is assumed for comparison floorspace and 0.3% 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.

4.14 There were 25 vacant shop units within Andover and Romsey town centres, a vacancy rate of about 6.2%, which is below the Goad national average (10%). All centres will have a certain level of vacant floorspace at any given time, and this reflects the natural churn of occupiers. Given the relatively low shop vacancy rate it is unlikely that existing premises can accommodate a significant proportion of the retail floorspace projections in this report. Therefore opportunities for new development need to be identified, if Andover and Romsey are to maintain their current market share of expenditure.

4.15 Andover and Romsey town centre's should be maintained and enhanced as Town Centre's. As the main centre's in the Borough, these town centres should serve their settlements and the rural catchment area, and should embrace a wide range of activities. In order to maintain and enhance their current roles, the two town centres should be the focus for major retail developments. To meet the Borough's need for retail uses major development is required in both town centre's in the medium to long term. An appropriate balance of uses needs to be maintained and existing town centre uses should be protected. The study has identified a need for new comparison retail development, over and above the existing commitments up to 2016. Andover and Romsey town centres should be the main focus for large-scale retail development, where the development has a wide catchment area and seeks to serve the northern and southern halves of the Borough. However, each development proposal must be considered on its individual merits.

4.16 Development within local centres should primarily serve the local catchment area of the respective centre. The extent of the catchment area of each centre will vary depending on the scale and nature of the centre and the location of competing centres. Therefore the appropriateness of development can only be determined on a case by case basis.

Future Strategy Implementation and Monitoring

4.17 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- application of guidance within PPS6, particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- measures to improve accessibility and public transport to the town and local centres in order to encourage more residents to shop in their nearest centre;
- the implementation of shop frontage policies within the development plan to protect retail and other desirable town centre uses; and
- measures to bring forward development opportunities.

4.18 The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecast up to 2021 and 2026. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.

4.19 Therefore, we would recommend that this retail capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);

- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons Retail Ranking); and
- implemented development within and around the study area.

4.20 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to address the implementation of major developments that will significantly alter shopping patterns in the Borough.

5.0 PLANNING POLICY CONTEXT

National Policy

5.1 PPS6: Planning for Town Centres (March 2005) sets out the Government's policies on town centres, retail, commercial leisure and other town centre uses.

5.2 The Government's key objective for town centres (this covers city, town, district and local centres) is to promote their vitality and viability by planning for growth and development of existing centres and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

5.3 Other Government objectives that need to be taken account of in the context of the key objective are set out in paragraph 1.4:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

5.4 Regional planning bodies (RPB's) and local planning authorities (LPAs) are advised in paragraph 1.6 to implement the Government's objectives for town centres, by planning positively for their growth and development. They should therefore:

- develop a hierarchy and network of centres;
- assess the need for further main town centre uses and ensure there is capacity to accommodate them;
- focus development in, and plan for the expansion of, existing centres as appropriate, and at the local level identify appropriate sites in development plan documents;
- promote town centre management, creating partnerships to develop, improve and maintain the town centre and manage the evening and night-time economy; and
- regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.

5.5 Paragraph 2.1 states that in order to deliver the Government's key objective, RPB's and LPA's should actively promote growth and manage change in town centres, define the network and a hierarchy of centres, each performing their appropriate role to meet the needs of their catchment, and adopt a pro-active, plan-led approach to planning for town centres, through regional and local planning.

5.6 The main town centre uses to which PPS6 applies are outlined in paragraph 1.8:

- retail (including warehouse clubs and factory outlet centres);
- leisure, entertainment facilities and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);
- offices, both commercial and those of public bodies; and
- arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

5.7 PPS6, paragraph 2.15 to 2.17 offers specific guidance to LPA's on the role of plans at local level, including the need to work in conjunction with stakeholders and the community to:

- assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;
- identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where changes need to be made;
- identify centres within their area where development will be focused, as well as the need for any new centres of local importance, and development strategies for developing and strengthening centres within their area;
- define the extent of the primary shopping area and the town centre, for the centre in their area on their proposal map;
- review all existing allocations and reallocate sites which do not comply with this policy statement;
- identify and allocate sites in accordance with the considerations on sight selection and land assembly e.g. assessment of need, appropriate scale of development, sequential approach, impact and accessibility;
- develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities; and

- set out criteria based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

5.8 PPS6 also indicates that in addition to defining the extent of the primary shopping area for their local centres, LPA's may distinguish between primary and secondary frontages. Primary frontages should contain a high proportion of retail uses, while secondary frontages provide opportunities for flexibility and diversity of uses. Policy should make clear which uses will be permitted in such locations.

Demonstrating Need for development

5.9 PPS6 require Council's to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. This study assesses the retail needs of Test Valley Borough.

5.10 PPS6 states in paragraph 2.33 that:

> *'in assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve the communities in these areas, additional weight should be given to meeting these qualitative needs'.*

5.11 In assessing quantitative need for additional development, local planning authorities should assess the likely future demand for additional retail floorspace, having regard to a realistic assessment of the existing forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and forecast improvements in productivity in the use of floorspace.

5.12 With regards to assessing the qualitative need for additional development, paragraph 2.35 states that a key consideration will be to provide for consumer choice, ensuring that:

- an appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and

- provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.

5.13 Other local issues, although not necessarily elements of *'need',* can be important material considerations.

Appropriate Scale of Development

5.14 PPS6 also requires that local planning authorities ensure that the scale of opportunities identified is directly related to the role and function of the centre and its catchment. Paragraph 2.41 states:

> *'The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that is fits into that centre and that it complements its role and function'.*

5.15 For city and town centres, PPS6, paragraph 2.43 states that where a need has been identified, LPA's should seek to identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments. Paragraph 2.42 indicates that in most cases it is likely to be inappropriate to include local centres within the search area to be applied under the sequential approach for large scale developments.

5.16 The guidance places greater emphasis on the regeneration of town centres, particularly smaller centres and the need to define a network of centres, and where appropriate to plan for the decline of some centres. Local authorities are expected to set indicative upper limits on the scale of new floorspace appropriate in different types of centres.

The Sequential Approach

5.17 PPS6 sets out the sequential approach to site selection for new retail development (paragraph 2.44), namely that first preference should be existing centres where suitable sites or buildings for conversion are, or are likely to become available, taking account of an appropriate scale of development in relation to the role and function of the centre, followed by edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre and only then out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

5.18 Further to this LPA's should, in consultation with stakeholders (including the development industry) and the community, identify an appropriate range of sites to allow for accommodation of the identified need. Paragraph 2.45 emphasises the need for flexibility and realism from both LPA's and developers and operators in discussing the identification of sites,

> *'LPA's should be sensitive to the needs of the community and stakeholders, including developers and operators and identify sites that are, or are likely to become available for development during the development plan period and which allow for the accommodation of the identified need, including sites capable of accommodating a range of business models'.*

5.19 The factors that should be taken into account in considering business models are scale, format, car park provision and the scope for disaggregation.

5.20 In selecting sites for allocation, the LPA should also consider the degree to which other considerations, including specific local circumstances, may be material to the choice of appropriate locations for development, and these include physical regeneration, employment, economic growth and social inclusion.

5.21 The guidance clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping and services. If a 'need' for new development is established, it will be necessary to identify opportunities to meet that need. PPS6 indicates that local authorities should allocate sufficient sites to meet anticipated demand for the next five years. PPS6 also suggests that an apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase (CPO) powers, to ensure that suitable sites within or on the edge of centres are brought forward for development.

5.22 This suggests the onus is placed on the Council to identify sites to accommodate the 5-year demand for development. This study provides floorspace projections up to 2026. Therefore, it may not be appropriate for the Council to seek to identify opportunities to accommodate projections up to 2026 at this stage.

5.23 PPS6 also suggests that where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses. Extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities should seek to make provision for them in this context. In such cases, local planning authorities should seek to identify, designate and assemble larger sites adjoining the primary shopping area (i.e. in edge-of-centre locations).

Planning Policy Guidance Note 13: Transport (PPG 13, March 2001)

5.24 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:

- *"promote more sustainable transport choices for both people and for moving freight;*
- *promote accessibility to jobs, shopping, leisure facilities and services by public transport; and*
- *reduce the need to travel, especially by car."*

5.25 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

Regional Planning Guidance

5.26 The regional planning framework for the South East is currently provided by RPG9, which was approved in 2001. However, it is soon to be replaced by the forthcoming Regional Spatial Strategy (RSS), also know as the 'South East Plan', which is presently undergoing an Examination in Public and is due for government approval and subsequent adoption in early 2008. As this study covers the timescale from now until 2026, it is most relevant to look at both the current policies of RPG9 and the emerging policies of the RSS.

RPG9

5.27 Policy Q5 states that the Region's network of larger town centres should be the focus for major retail, leisure and office developments, to support an urban renaissance, promote social inclusion and encourage more sustainable patterns of development. The supporting text to the policy at paragraph C advises local authorities to:

- *assess the need for retail, leisure and office development in their area;*
- *identify which town and district centres should be the preferred locations for growth;*
- *apply the sequential approach in identifying retail development sites;*
- *avoid extending existing edge-of-centre and out-of-centre development while more central options exist.*

5.28 Advice is also given regarding setting up town and district centre improvement strategies and management schemes.

The RSS (South East Plan)

5.29 This draft RSS identifies a hierarchy of primary and secondary regional centres where major retail, leisure and office development will be focused, i.e. development 10,000 sq m gross or more. Andover town centre is defined as one of 26 Secondary Regional Centres, along with Eastleigh, Fareham, Newbury and Winchester. The RSS identifies 24 Primary Regional Centres including Southampton, Portsmouth and Basingstoke.

5.30 The RSS also identifies six Sub-Regional Strategy Areas. The South Hampshire Sub-regional Strategy Area covers Eastleigh, Fareham, Gosport, Havant, Portsmouth and Southampton and parts of East Hampshire along with parts of New Forest, Test Valley and Winchester Districts. Within this sub-regional area, Southampton and Portsmouth are primary regional centres. Eastleigh and Fareham are identified as secondary regional centres. Romsey town centre lies within this sub-region. The RSS indicates that Andover is not located in any sub-regional strategy area.

5.31 The Western Corridor and Blackwater Valley is also identified as a sub-regional strategy area, and encompasses High Wycombe, Reading, Newbury, Basingstoke, Aldershot, Windsor and Slough. Although this area does not include Andover, strong link is identified between Andover and this sub-region in terms of comparison goods shopping patterns. The RSS goes on to suggest that the local authority should undertake further work on the development of Andover, reflecting its characteristics and links to this sub-region.

5.32 The RSS advocates distributing growth to middle and lower order centres so as to support a balanced network of centres rather than one that is dwarfed by the largest centres. It asserts that Local Centres are likely to be a for some development and policy BE5 states that

> *Local Planning Authorities (LPAs) should encourage and initiate schemes and proposals that help strengthen the viability of small rural towns, recognising that their social, economic and cultural importance to wider rural areas and the region as a whole. LPAs, through their Local Development Documents should…support and reinforce the role of small rural towns as local hubs for employment, retailing and community facility and services.*

Hampshire Structure Plan 1996-2011 Review (December 2000)

5.33 The Hampshire Structure Plan was adopted in January 2000. Policy S1 relates to town centres and shopping, and in line with PPG6, suggests that planning permission will be granted for development which maintains and/or enhances the vitality and viability of town centres, which includes Andover and Romsey. The priorities are to support the primary shopping function of the centre, diversify land uses in the centre in particular employment and educational opportunities, leisure, entertainment and cultural facilities and residential accommodation. Other priorities are to maintain or improve the amenity and environment including the enhancement of the provision of open space and improve access, safety and security for public transport, pedestrians, cyclists and people with special needs.

5.34 The structure plan emphasises the need for local plans to promote policies to maintain and/or enhance the vitality and viability of district, local and village centres, and ensure that where possible adequate provision is made for local shops to meet day-to-day shopping requirements.

5.35 Supplementary Planning Guidance on Town Centre and Out of Centre Development (Hampshire Planning Authorities 1998) identifies Andover and Romsey as Historic Market Towns in Hampshire along with Lymington, Ringwood, Hythe, Alton, Petersfield and Winchester. Within Historic Market Towns, the centres are compact and attractive with a good mix of shops and services available. The main policy objectives in the Historic Market Towns are to continue to reconcile the conservation of the historic environment with the need to accommodate transport and development requirements and to re-evaluate the role of these established centres. It also states that the towns should resist pressure for out of centre development where town centre vitality and viability is threatened and to consider such proposals using the sequential approach.

5.36 The Hampshire Structure Plan (2000) outlines four 'Major Development Areas' in order to accommodate the long term development needs of Hampshire through large-scale development. Andover is identified as one of these four areas by policy MDA5 which states that it will:

- *provide for at least 3000 dwellings in the period 2001 to 2011; and*
- *provide for the development of social, community and recreational facilities required by the long-term requirements of the town.*

5.37 Policy MDA1 states that:

> *In each area, provision will be made for the co-ordinated and integrated development of transport, housing, employment, health, community and social facilities, shopping, education, formal and informal recreation and leisure facilities and other identified local needs. In determining the location of land uses, the local planning authorities will seek to ensure that adequate opportunities are provided to meet locally generated needs.*

5.38 The Structure Plan goes on to assert that although these Major Development Areas will be planned as new communities, they will also provide opportunities to contribute towards improving the vitality and viability of the wider urban area of which they form a part. In some instances, the development will provide opportunities to enhance the choice of facilities on offer to existing residents either by new provision within the development area or by triggering the expansion of existing facilities.

Local Planning Context

5.39 The Test Valley Borough Local Plan First Review was adopted on 2nd June 2006. With regards to Town Centres, the Adopted Local Plan states that the Council's aim is to enhance the role of the centres of Andover and Romsey, partly through encouraging major retail developments within the centres, whilst prohibiting developments that may harm the vitality and viability of the town centres.

5.40 The Adopted Local Plan champions the sequential approach advocated in PPS 6, and states that development for key town centre uses (including retail) will not be permitted if there is an alternative location which is preferable according to the sequential approach. The Local Plan also asserts that the scale of major new developments should comply with the size and character of the centre within which they are proposed.

5.41 One of the aims of the Local Plan is to retain existing local shops, public houses and facilities, as outlined by policies ESN 18 and ESN 19 which respectively state that:

> *"Development (including the change of use of existing premises) which involves the loss of local shops and local public houses, will only be permitted if it can be demonstrated that the use is no longer commercially viable.*
>
> *and*
>
> *Development which results in the loss of a local community facility, will only be permitted if it can be demonstrated that it is no longer practical or desirable to use the facility for its existing use or another use is likely to benefit the local community."*

5.42 The Local Plan refers to Andover as an historic market town, and states that it has comparatively good infrastructure, but that its range shops and facilities is somewhat below what the standard of other comparable towns in the region. Test Valley Borough Council have developed a strategy for Andover's future and amongst its objectives is the aim of improving the standard and range of facilities which requires the promotion of the quality and range of shopping and leisure facilities.

5.43 Romsey is referred to as a market town in the Local Plan which mentions the significant influence of Romsey being partly within the floodplain of the River Test has had on the character of its built environment. New developments should respect Romsey's historic core, and the character of its Conservation Area, they should also allow for key views of the Abbey to be maintained. The Local Plan acknowledges that Romsey faces competition from Southampton and other large nearby centres, however, it recognises that Romsey provides an alternative shopping experience with an individual mix of shops and facilities and its historic character.

5.44 The Council considers it essential that town centres should remain predominantly in retail use at ground floor level. The Council recognises that non-retail uses such as banks, estate agents, public houses, bars and restaurants are an established feature of most town centres and that they have a role to play in sustaining the vitality and viability of shopping areas, however, non-retail uses should not be allowed to dominate any one particular shopping frontage or centre. Policies AND 07.2 and STV

08.2 assert that proposals for change of use or redevelopment to a non-retail will not be permitted if they will result in either a continuous street frontage of three or more non-retail uses or more than an allotted proportion of the street frontage being in non retail use; the proportion varies between shopping areas, and ranges from 15-55%.

5.45 The Local Plan identifies Andover and Romsey's primary and secondary shopping areas as follows:

- Policy AND 07.1 defines Andover's primary shopping areas as:

  (i) *Bridge Street (West):*

  (ii) *Chantry Centre;*

  (iii) *Lower High Street;*

  (iv) *Union Street; and*

  (v) *Upper High Street.*

- The policy also defines Andover's secondary shopping areas:

  (i) *Bridge Street (East);*

  (ii) *London Street;*

  (iii) *Swan Court; and*

  (iv) *Upper High Street/Chantry Street.*

- Policy STV 08.1 defines Romsey's primary shopping areas as:

  (i) *Bell Street;*

  (ii) *Church Street;*

  (iii) Latimer Stree*t;*

  (iv) *Market Place; and*

  (v) *The Hundred.*

5.46 The Hundred (East) is the only defined secondary shopping area in Romsey.

5.47 In accordance with the Hampshire Structure Plan (2006) the Local Plan highlights two sites in Andover to meet the need for a Major Development Area; one is the land east of Icknield Way, in the area of East Anton, and the other is land at Picket Twenty.

5.48 The land east of Icknield Way has been allocated for a major new housing development (2,500 dwellings) by the Local Plan, and retail provision of approximately 2,500 square metres is expected to accompany the development as part of the proposed community facilities.

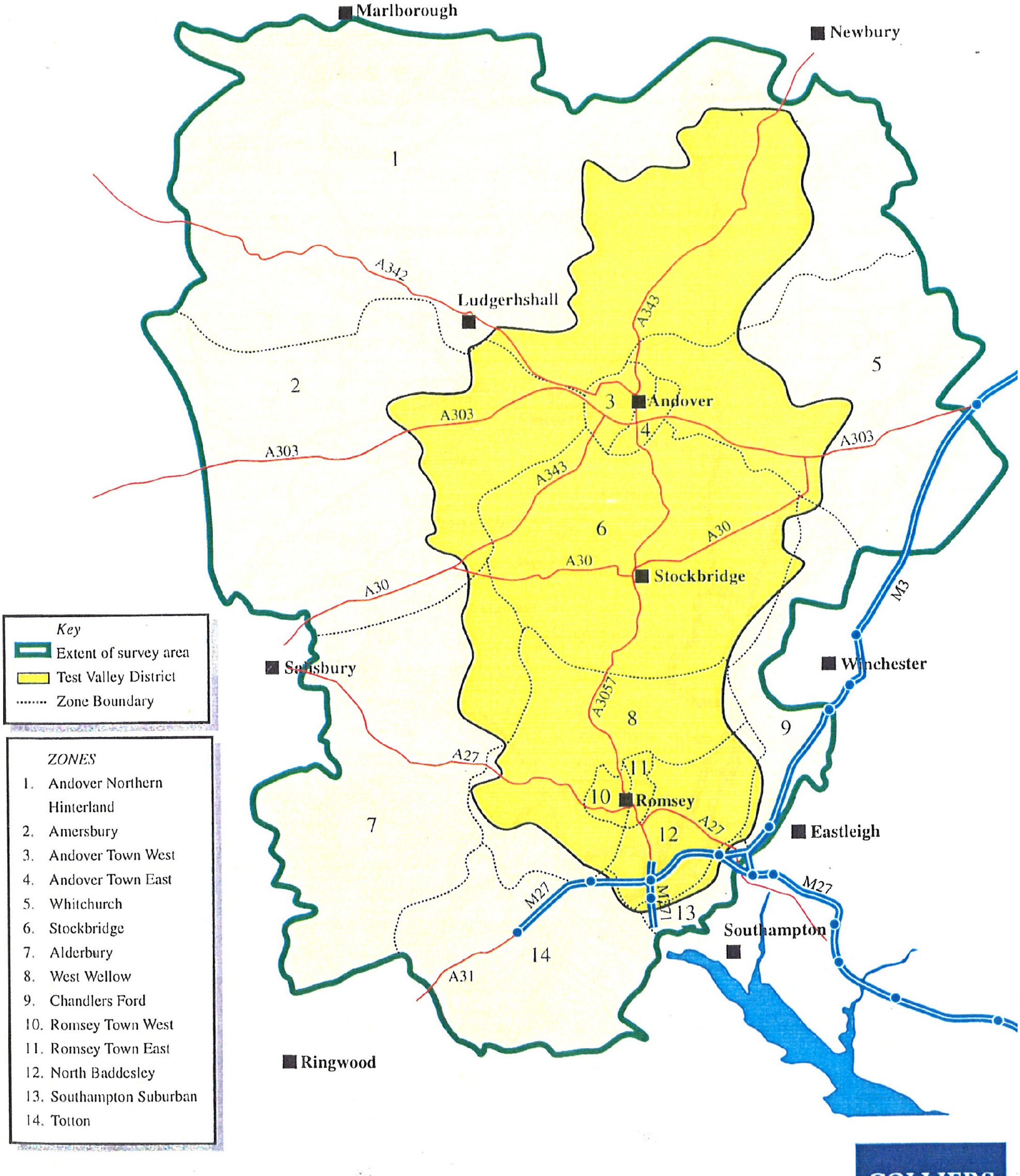
5.49 The land at Picket Twenty is expected to provide 1,200 new dwellings and approximately 1,000 square metres of retail provision.

5.50 In addition to the site allocated as Major Development Areas, the Local Plan also allocates land to the north of the Chantry Centre at Chantry Street for a retail (comparison) development of approximately 3,300 square metres of additional retail floorspace.

Appendix A

Study Area and Existing Retail Facilities

TEST VALLEY ZONE MAP



TEST VALLEY
BOROUGH COUNCIL

COLLIERS
ERDMAN LEWIS
RESEARCH AND CONSULTANCY

Table 1A - Convenience Floorspace and Expected Turnover (2005 prices)

Town/Store	Net Sales Floorspace Sq M	% Conv. Sales Floorspace	Conv. Sales Floorspace Sq M Net	Turnover Sales Sales Density £ per Sq M	£M Total Conv. Turnover
Andover					
Iceland, Andover	621	95%	590	£4,914	£2.90
Marks & Spencer Food Court, Andover	300	100%	300	£10,099	£3.03
Sainsbury, Andover	1,616	95%	1,535	£9,335	£14.33
Tesco, River Way, Andover	2,970	85%	2,525	£13,088	£33.04
Waitrose, Andover	1,293	95%	1,228	£10,708	£13.15
Co-op (Alldays), Junction Road, Andover	88	100%	88	£5,702	£0.50
Co-op (Alldays), Weyhill Road, Andover	129	100%	129	£5,702	£0.74
Co-op (Alldays), Atholl Court, Andover	168	100%	168	£5,702	£0.96
Tesco, Chantry Way, Andover	1,496	90%	1,346	£13,088	£17.62
Tesco, Compton Square, Andover	155	100%	155	£13,088	£2.03
Lidl, Andover	1,248	80%	998	£2,605	£2.60
Other town centre shops	500	100%	500	£5,000	£2.50
Total	**10,584**		**9,563**	**£9,767**	**£93.40**
Romsey					
Co-op (Welcome), Romsey	300	98%	294	£5,702	£1.68
Co-op (Alldays), Romsey	210	100%	210	£5,702	£1.20
Waitrose, Romsey	1,932	93%	1,797	£10,708	£19.24
Aldi, Romsey	800	80%	640	£3,891	£2.49
Other town centre shops	1,200	100%	1,200	£5,000	£6.00
Total	**4,442**		**4,141**	**£7,391**	**£30.60**
Other					
Co-op, Stockbridge	176	100%	176	£5,702	£1.00
Other Stockbridge shops	100	100%	100	£4,000	£0.40
Total	**276**		**276**	**£5,085**	**£1.40**
GRAND TOTAL	**15,302**		**13,980**	**£8,971**	**£125.41**
	Comparison Sales Floorspace in Food Stores Sq M Net				**1,322**

Sources: IGD Food Store Directory
Experian Goad
NLP Site Survey 2007
Retail Rankings 2006

Table 2A - Town Centre Comparison Floorspace and Expected Turnover (2005 prices)

	Net Sales Floorspace Sq M	Turnover Sales Density Per Sq M	Total Turnover £M
Andover Town Centre			
Town Centre Comparison Shops	16,240	£5,000	£81.20
Comparison floorspace in food stores:			
Icleand, Andover	30	£2,592	£0.08
Sainsbury, Andover	80	£5,633	£0.45
Tesco, River Way, Andover	590	£6,470	£3.82
Waitrose, Andover	60	£9,364	£0.56
Tesco, Chantry Way, Andover	150	£6,470	£0.97
Lidl, Andover	250	£4,064	£1.02
Total Town Centre	**17,400**	**£5,063**	**£88.09**
Romsey Town Centre			
Town centre comparison shops	7,189	£5,000	£35.95
Comparison floorspace in food stores:			
Co-op (Stop & Shop), Romsey	10	£3,123	£0.03
Waitrose, Romsey	140	£9,364	£1.31
Aldi, Romsey	160	£5,826	£0.93
Total	**7,499**	**£5,097**	**£38.22**
Grand Total	**24,899**	**£5,073**	**£126.31**

Sources: NLP Site Survey 2007
Retail Rankings 2006
Table 1A

Table 3A - Out of Centre Retail Warehouse Floorspace and Expected Turnover (2005 prices)

Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Turnover Floorspace Density Per Sq M	Total Turnover £M
Andover: Enham Arch Retail Park				
Homebase*	5,687	5,118	£1,568	£8.03
Vacant (former Right Price Tiles)	540	0	£0	£0.00
Rosebys	444	400	£2,000	£0.80
Benson Bed Centre	167	150	£1,859	£0.28
Halfords	1,080	918	£2,327	£2.14
Next	1,720	1,548	£8,257	£12.78
Pets at Home (1)	960	816	n/a	£1.96
Andover: Churchill Retail Park				
Harveys Furnishing	832	707	£1,859	£1.31
Currys	832	707	£5,451	£3.85
Benson Bed Centre	578	520	£1,859	£0.97
Northern Avenue Retail Park				
Wickes	2,976	2,678	£2,871	£7.69
The Range	3,312	2,815	£2,000	£5.63
Andover: Other				
Focus, Shephers Spring Lane	3,170	2,853	£1,164	£3.32
Carpetright, Churchill Way	836	711	£1,454	£1.03
Andover Sub-Total	**23,134**	**19,942**	**£2,497**	**£49.79**
Nursling Estate Retail Park				
B&Q	7,621	6,859	£2,302	£15.79
Harveys Furnishing	771	655	£1,859	£1.22
Carpetright	771	655	£1,454	£0.95
Vacant Unit	771	0	£0	£0.00
Southampton Sub-Total	**9,934**	**8,170**	**£2,198**	**£17.96**
GRAND TOTAL	**33,068**	**28,111**	**£2,410**	**£67.75**

(1) Total Turnover is based on average per outlet, rather than according to turnover floorspace density

Sources: NLP Site Survey 2007
Breckland District Council
Retail Rankings 2006 (2004/05 Prices)
Table 1A

Table 4A - Retail Development Commitments and Expected Turnover

	Net Sales Floorspace Sq M	Turnover Sales Density Per Sq M	Total Turnover £M
Asda, Andover			
Convenience space	2,787	£15,780	£43.98
Comparison space	1,394	£7,298	£10.17
Total	4,181	£12,952	£54.15

Source: RPS Asda Retail Study 2005
Retail Ranking 2006

Table 5A: Company Average Sales Density Estimates for High Street Comparison Retailers (2005 Prices)

Operator	Company Average Turnover Per Sq M
The Pier (2003/4 figure)	£4,073
Comet	£7,285
Dixons	£11,408
The Link	£19,313
Robert Dyas (2003/04)	£3,706
Wilkinson hardware (2003/04)	£3,415
Debenhams (2002/2003)	£2,884
House of Fraser	£1,948
John Lewis	£6,754
TJ Hughes	£1,998
All Sports (2003/04)	£4,313
Bhs (2003/04)	£2,315
Bon Marche (2003/04)	£2,711
Boots Chemists (2003/04 figure)	£8,021
Blacks Leisure	£3,971
C&J Clark	£10,881
Clinton Cards (2003/04)	£3,579
Early Learning	£4,914
French Connection	£4,996
Game	£12,344
Gap	£3,664
Giles Sports (2003/04)	£3,630
Goldsmith Jewellers	£12,471
Hargreaves Sport (2003/04)	£3,858
HMV	£11,686
Marks & Spencer (non-food)	£5,038
Mothercare	£2,569
MVC Entertainment	£5,021
New Look	£5,348
Next	£8,257
Ottakars	£4,035
Peacock (2003/04)	£2,030
Poundstretcher/InStore (2003/04)	£1,644
QD Store (2003/04)	£2,080
River Island	£8,715
Ryman	£4,313
Sports World (2003/04)	£4,768
Staples (2003/04)	£2,011
Stead & Simpson	£3,936
Superdrug	£5,552
TK Maxx	£2,785
Waterstones	£4,148
WH Smith	£5,641
Woolworth	£3,082
AVERAGE	**£5,389**

Source: Retail Rankings 2006

Appendix B

Convenience Retail Assessment

Table 1B : Population Projections

Zone Area	2001	2006	2011	2016	2021	2026
Zone 1: Andover - N Hinterland	38,686	39,592	40,234	40,767	41,383	42,080
Zone 2: Amesbury	41,097	42,092	42,700	43,929	44,962	45,970
Zone 3: Andover - West	18,692	19,579	20,418	20,016	20,416	20,557
Zone 4: Andover - East	19,121	19,703	19,490	20,476	20,884	21,029
Zone 5: Whitchurch	18,466	19,009	19,553	19,971	20,129	20,326
Zone 6: Stockbridge	11,295	12,559	12,749	12,095	12,337	12,422
Zone 7: Alderbury	19,363	19,736	19,869	20,042	20,161	20,318
Zone 8: West Wellow	9,036	9,373	9,651	10,140	10,399	10,582
Zone 9: Chandlers Ford	45,474	47,503	48,857	51,331	52,485	53,490
Zone 10 and 11: Romsey	16,701	16,357	16,374	17,884	18,241	18,367
Zone 12: North Baddesley	7,352	7,470	7,710	7,873	8,030	8,086
Zone 13: Southampton Suburbs	51,361	52,610	53,781	54,128	54,478	54,694
Zone 14: Totton	18,178	18,441	18,404	18,120	17,837	17,630
Total	**314,822**	**324,024**	**329,791**	**336,772**	**341,741**	**345,551**

Sources: *Experian 2001 Census Population*
Hampshire, West Berkshire and Wiltshire CC Population Projections

Table 2B: Convenience Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2006	2011	2016	2021	2026	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021	Growth 2006-2026
Zone 1: Andover - N Hinterland	£1,695	£1,735	£1,811	£1,876	£1,942	2.4%	6.8%	10.7%	11.9%
Zone 2: Amesbury	£1,391	£1,424	£1,486	£1,539	£1,594	2.4%	6.8%	10.6%	11.9%
Zone 3: Andover - West	£1,510	£1,546	£1,614	£1,671	£1,731	2.4%	6.9%	10.7%	12.0%
Zone 4: Andover - East	£1,519	£1,555	£1,623	£1,681	£1,741	2.4%	6.8%	10.7%	12.0%
Zone 5: Whitchurch	£1,704	£1,745	£1,822	£1,886	£1,953	2.4%	6.9%	10.7%	11.9%
Zone 6: Stockbridge	£1,767	£1,809	£1,888	£1,955	£2,025	2.4%	6.8%	10.6%	11.9%
Zone 7: Alderbury	£1,798	£1,841	£1,922	£1,990	£2,061	2.4%	6.9%	10.7%	12.0%
Zone 8: West Wellow	£1,748	£1,790	£1,868	£1,935	£2,003	2.4%	6.9%	10.7%	11.9%
Zone 9: Chandlers Ford	£1,596	£1,634	£1,706	£1,766	£1,829	2.4%	6.9%	10.7%	11.9%
Zone 10 and 11: Romsey	£1,622	£1,662	£1,734	£1,796	£1,860	2.5%	6.9%	10.7%	11.9%
Zone 12: North Baddesley	£1,632	£1,672	£1,745	£1,807	£1,871	2.5%	6.9%	10.7%	11.9%
Zone 13: Southampton Suburbs	£1,557	£1,595	£1,665	£1,724	£1,785	2.4%	6.9%	10.7%	11.9%
Zone 14: Totton	£1,653	£1,693	£1,767	£1,830	£1,895	2.4%	6.9%	10.7%	11.9%

Sources:

Experian local estimates for 2005 convenience goods expenditure per capita

(Excluding special forms of trading - 1.8% in 2006, 2.3% in 2011 and beyond)

Experian Business Strategies - recommended forecast growth rates

(0.5% per annum between 2005 to 2010 and 0.9% per annum between 2010 and 2015 and 0.7% between 2015 to 2025)

Table 3B: Total Available Convenience Goods Expenditure (£M - 2005 Prices)

Zone	2006	2011	2016	2021	2026	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021	Growth 2006-2026
Zone 1: Andover - N Hinterland	£67.11	£69.81	£73.83	£77.63	£81.72	4.0%	10.0%	15.7%	21.8%
Zone 2: Amesbury	£58.55	£60.80	£65.28	£69.20	£73.28	3.9%	11.5%	18.2%	25.2%
Zone 3: Andover - West	£29.56	£31.57	£32.31	£34.11	£35.58	6.8%	9.3%	15.4%	20.4%
Zone 4: Andover - East	£29.93	£30.31	£33.23	£35.11	£36.61	1.3%	11.0%	17.3%	22.3%
Zone 5: Whitchurch	£32.39	£34.12	£36.39	£37.96	£39.70	5.3%	12.3%	17.2%	22.6%
Zone 6: Stockbridge	£22.19	£23.06	£22.84	£24.12	£25.15	3.9%	2.9%	8.7%	13.4%
Zone 7: Alderbury	£35.49	£36.58	£38.52	£40.12	£41.87	3.1%	8.6%	13.1%	18.0%
Zone 8: West Wellow	£16.38	£17.28	£18.94	£20.12	£21.20	5.4%	15.6%	22.8%	29.4%
Zone 9: Chandlers Ford	£75.81	£79.83	£87.57	£92.69	£97.83	5.3%	15.5%	22.3%	29.0%
Zone 10 and 11: Romsey	£26.53	£27.21	£31.01	£32.76	£34.16	2.6%	16.9%	23.5%	28.8%
Zone 12: North Baddesley	£12.19	£12.89	£13.74	£14.51	£15.13	5.7%	12.7%	19.0%	24.1%
Zone 13: Southampton Suburbs	£81.91	£85.78	£90.12	£93.92	£97.63	4.7%	10.0%	14.7%	19.2%
Zone 14: Totton	£30.48	£31.16	£32.02	£32.64	£33.41	2.2%	5.0%	7.1%	9.6%
Total	**£518.54**	**£540.40**	**£575.79**	**£604.90**	**£633.28**	**4.2%**	**11.0%**	**16.7%**	**22.1%**

Sources: *Table 1B and Table 2B*

Table 4B: **Convenience Shopping Penetration Rates 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14
Andover	24%	35%	92%	90%	52%	74%	0%	2%	4%	0%	0%	0%	0%
Romsey	0%	0%	0%	0%	0%	5%	5%	33%	6%	41%	31%	8%	4%
Stockbridge	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%	0%	0%
Local Centres/Shops	1%	2%	1%	4%	1%	1%	1%	2%	0%	2%	1%	0%	0%
District Total	**25%**	**37%**	**93%**	**94%**	**53%**	**86%**	**6%**	**37%**	**10%**	**43%**	**32%**	**8%**	**4%**
Outside District	75%	63%	7%	6%	47%	14%	94%	63%	90%	57%	68%	92%	96%
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***

Source: *Colliers Erdman Lewis Retail Study 1998*

Table 5B: **Convenience Expenditure 2006 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14	Total
Expenditure 2006	**£67.11**	**£58.55**	**£29.56**	**£29.93**	**£32.39**	**£22.19**	**£35.49**	**£16.38**	**£75.81**	**£26.53**	**£12.19**	**£81.91**	**£30.48**	**£518.54**
Andover	£16.11	£20.49	£27.20	£26.94	£16.84	£16.42	£0.00	£0.33	£3.03	£0.00	£0.00	£0.00	£0.00	£127.36
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£1.11	£1.77	£5.41	£4.55	£10.88	£3.78	£6.55	£1.22	£35.27
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.33
Local Centres/Shops	£0.67	£1.17	£0.30	£1.20	£0.32	£0.22	£0.35	£0.33	£0.00	£0.53	£0.12	£0.00	£0.00	£5.22
District Total	£16.78	£21.66	£27.49	£28.13	£17.17	£19.08	£2.13	£6.06	£7.58	£11.41	£3.90	£6.55	£1.22	£169.18
Outside District	£50.33	£36.89	£2.07	£1.80	£15.22	£3.11	£33.36	£10.32	£68.23	£15.12	£8.29	£75.36	£29.26	£349.36
Market Share Total	**£67.11**	**£58.55**	**£29.56**	**£29.93**	**£32.39**	**£22.19**	**£35.49**	**£16.38**	**£75.81**	**£26.53**	**£12.19**	**£81.91**	**£30.48**	**£518.54**

Table 6B: **Future Convenience Shopping Penetration Rates 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14
Tesco, Tidworth	20%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Proposed Asda, Andover	6%	8%	25%	25%	17%	25%	0%	1%	2%	0%	0%	0%	0%
Andover	13%	20%	69%	67%	40%	53%	0%	2%	3%	0%	0%	0%	0%
Romsey	0%	0%	0%	0%	0%	3%	5%	33%	6%	41%	31%	8%	4%
Stockbridge	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%	0%	0%
Local Centres/Shops	1%	2%	1%	4%	1%	1%	1%	2%	0%	2%	1%	0%	0%
District Total	**20%**	**30%**	**95%**	**96%**	**58%**	**88%**	**6%**	**38%**	**11%**	**43%**	**32%**	**8%**	**4%**
Outside District	60%	50%	5%	4%	42%	12%	94%	62%	89%	57%	68%	92%	96%
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***

Source: *Table 4B*
Burnett Planning & Development Limited Tesco Stores Limited: Proposed Foodstore and Unit Shops at Station Road, Tidworth Town Centre, 2005

Table 7B: **Convenience Expenditure 2011 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14	Total
Expenditure 2011	**£69.81**	**£60.80**	**£31.57**	**£30.31**	**£34.12**	**£23.06**	**£36.58**	**£17.28**	**£79.83**	**£27.21**	**£12.89**	**£85.78**	**£31.16**	**£540.40**
Tesco, Tidworth	£13.96	£12.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£26.12
Proposed Asda, Andover	£4.19	£4.86	£7.89	£7.58	£5.80	£5.77	£0.00	£0.17	£1.60	£0.00	£0.00	£0.00	£0.00	£37.86
Andover	£9.07	£12.16	£21.78	£20.31	£13.65	£12.22	£0.00	£0.35	£2.39	£0.00	£0.00	£0.00	£0.00	£91.93
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£1.83	£5.70	£4.79	£11.16	£4.00	£6.86	£1.25	£36.27
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38
Local Centres/Shops	£0.70	£1.22	£0.32	£1.21	£0.34	£0.23	£0.37	£0.35	£0.00	£0.54	£0.13	£0.00	£0.00	£5.40
District Total	**£13.96**	**£18.24**	**£29.99**	**£29.09**	**£19.79**	**£20.30**	**£2.19**	**£6.56**	**£8.78**	**£11.70**	**£4.12**	**£6.86**	**£1.25**	**£172.85**
Outside District	£41.88	£30.40	£1.58	£1.21	£14.33	£2.77	£34.38	£10.71	£71.05	£15.51	£8.77	£78.92	£29.91	£341.43
Market Share Total	**£69.81**	**£60.80**	**£31.57**	**£30.31**	**£34.12**	**£23.06**	**£36.58**	**£17.28**	**£79.83**	**£27.21**	**£12.89**	**£85.78**	**£31.16**	**£540.40**

Table 8B: **Convenience Expenditure 2016 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14	Total
Expenditure 2016	**£73.83**	**£65.28**	**£32.31**	**£33.23**	**£36.39**	**£22.84**	**£38.52**	**£18.94**	**£87.57**	**£31.01**	**£13.74**	**£90.12**	**£32.02**	**£575.79**
Tesco, Tidworth	£14.77	£13.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£27.82
Proposed Asda, Andover	£4.43	£5.22	£8.08	£8.31	£6.19	£5.71	£0.00	£0.19	£1.75	£0.00	£0.00	£0.00	£0.00	£39.87
Andover	£9.60	£13.06	£22.29	£22.27	£14.56	£12.10	£0.00	£0.38	£2.63	£0.00	£0.00	£0.00	£0.00	£96.87
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£1.93	£6.25	£5.25	£12.71	£4.26	£7.21	£1.28	£39.58
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37
Local Centres/Shops	£0.74	£1.31	£0.32	£1.33	£0.36	£0.23	£0.39	£0.38	£0.00	£0.62	£0.14	£0.00	£0.00	£5.81
District Total	**£14.77**	**£19.58**	**£30.69**	**£31.90**	**£21.10**	**£20.10**	**£2.31**	**£7.20**	**£9.63**	**£13.33**	**£4.40**	**£7.21**	**£1.28**	**£183.51**
Outside District	£44.30	£32.64	£1.62	£1.33	£15.28	£2.74	£36.21	£11.74	£77.94	£17.68	£9.34	£82.91	£30.74	£364.46
Market Share Total	**£73.83**	**£65.28**	**£32.31**	**£33.23**	**£36.39**	**£22.84**	**£38.52**	**£18.94**	**£87.57**	**£31.01**	**£13.74**	**£90.12**	**£32.02**	**£575.79**

Table 9B: **Convenience Expenditure 2021 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14	Total
Expenditure 2021	**£77.63**	**£69.20**	**£34.11**	**£35.11**	**£37.96**	**£24.12**	**£40.12**	**£20.12**	**£92.69**	**£32.76**	**£14.51**	**£93.92**	**£32.64**	**£604.90**
Tesco, Tidworth	£15.53	£13.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£29.37
Proposed Asda, Andover	£4.66	£5.54	£8.53	£8.78	£6.45	£6.03	£0.00	£0.20	£1.85	£0.00	£0.00	£0.00	£0.00	£42.04
Andover	£10.09	£13.84	£23.54	£23.52	£15.19	£12.78	£0.00	£0.40	£2.78	£0.00	£0.00	£0.00	£0.00	£102.14
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.72	£2.01	£6.64	£5.56	£13.43	£4.50	£7.51	£1.31	£41.68
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.45
Local Centres/Shops	£0.78	£1.38	£0.34	£1.40	£0.38	£0.24	£0.40	£0.40	£0.00	£0.66	£0.15	£0.00	£0.00	£6.13
District Total	**£15.53**	**£20.76**	**£32.41**	**£33.70**	**£22.02**	**£21.22**	**£2.41**	**£7.65**	**£10.20**	**£14.09**	**£4.64**	**£7.51**	**£1.31**	**£193.44**
Outside District	£46.58	£34.60	£1.71	£1.40	£15.94	£2.89	£37.71	£12.48	£82.49	£18.67	£9.87	£86.41	£31.34	£382.09
Market Share Total	**£77.63**	**£69.20**	**£34.11**	**£35.11**	**£37.96**	**£24.12**	**£40.12**	**£20.12**	**£92.69**	**£32.76**	**£14.51**	**£93.92**	**£32.64**	**£604.90**

Table 10B: **Convenience Expenditure 2026 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10/11	Zone 12	Zone 13	Zone 14	Total
Expenditure 2026	**£81.72**	**£73.28**	**£35.58**	**£36.61**	**£39.70**	**£25.15**	**£41.87**	**£21.20**	**£97.83**	**£34.16**	**£15.13**	**£97.63**	**£33.41**	**£633.28**
Tesco, Tidworth	£16.34	£14.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£31.00
Proposed Asda, Andover	£4.90	£5.86	£8.90	£9.15	£6.75	£6.29	£0.00	£0.21	£1.96	£0.00	£0.00	£0.00	£0.00	£44.02
Andover	£10.62	£14.66	£24.55	£24.53	£15.88	£13.33	£0.00	£0.42	£2.94	£0.00	£0.00	£0.00	£0.00	£106.93
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.75	£2.09	£6.99	£5.87	£14.01	£4.69	£7.81	£1.34	£43.56
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.51	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.51
Local Centres/Shops	£0.82	£1.47	£0.36	£1.46	£0.40	£0.25	£0.42	£0.42	£0.00	£0.68	£0.15	£0.00	£0.00	£6.43
District Total	**£16.34**	**£21.98**	**£33.81**	**£35.15**	**£23.02**	**£22.14**	**£2.51**	**£8.05**	**£10.76**	**£14.69**	**£4.84**	**£7.81**	**£1.34**	**£202.45**
Outside District	£49.03	£36.64	£1.78	£1.46	£16.67	£3.02	£39.36	£13.14	£87.07	£19.47	£10.29	£89.82	£32.07	£399.83
Market Share Total	**£81.72**	**£73.28**	**£35.58**	**£36.61**	**£39.70**	**£25.15**	**£41.87**	**£21.20**	**£97.83**	**£34.16**	**£15.13**	**£97.63**	**£33.41**	**£633.28**

Table 11B: **Summary of Convenience Turnover 2006 to 2026 (£Million)**

Town	2006	2011	2016	2021	2026
Available Expenditure in District					
Andover	£127.36	£129.79	£136.75	£144.18	£150.95
Romsey	£35.27	£36.27	£39.58	£41.68	£43.56
Stockbridge	£1.33	£1.38	£1.37	£1.45	£1.51
Local Centres/Shops	£5.22	£5.40	£5.81	£6.13	£6.43
Total	**£169.18**	**£172.85**	**£183.51**	**£193.44**	**£202.45**
Benchmark Turnover of Existing Facilities					
Andover	£93.40	£94.81	£96.24	£97.69	£99.17
Romsey	£30.60	£31.06	£31.53	£32.01	£32.49
Stockbridge	£1.40	£1.42	£1.44	£1.46	£1.49
Local Centres/Shops	£5.22	£5.29	£5.37	£5.46	£5.54
Total	**£130.62**	**£132.59**	**£134.59**	**£136.62**	**£138.68**
Commitments					
Andover	n/a	£43.93	£44.59	£45.27	£45.95
Romsey	n/a	n/a	n/a	n/a	n/a
Stockbridge	n/a	n/a	n/a	n/a	n/a
Local Centres/Shops	n/a	n/a	n/a	n/a	n/a
Total	**n/a**	**£43.93**	**£44.59**	**£45.27**	**£45.95**
Surplus Expenditure					
Andover	£33.96	-£8.95	-£4.09	£1.22	£5.84
Romsey	£4.67	£5.21	£8.05	£9.67	£11.07
Stockbridge	-£0.07	-£0.04	-£0.07	-£0.02	£0.02
Local Centres/Shops	n/a	£0.10	£0.44	£0.67	£0.89
Total	**£38.56**	**-£3.67**	**£4.33**	**£11.55**	**£17.82**
Turnover Density for New Floorspace					
£ Per Sq m Net					
Andover/Romsey	£8,971	£9,106	£9,244	£9,383	£9,525
Stockbridge/Local Shops	£5,000	£5,075	£5,152	£5,230	£5,309
Floorspace (Sq m (Net))					
Andover	n/a	-983	-442	130	613
Romsey	n/a	572	871	1,031	1,162
Stockbridge	n/a	-7	-14	-3	4
Local Centres/Shops	n/a	20	85	129	168
Total	**n/a**	**-397**	**499**	**1,287**	**1,947**

Sources: Tables 1A, 2A, 5B to 14B

Appendix C

Comparison Retail Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2006	2011	2016	2021	2026	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021	Growth 2006-2026
Zone 1: Andover - N Hinterland	£2,942	£3,528	£4,165	£5,019	£6,048	19.9%	41.6%	70.6%	71.4%
Zone 2: Amesbury	£2,565	£3,075	£3,631	£4,375	£5,272	19.9%	41.6%	70.6%	71.4%
Zone 3: Andover - West	£2,889	£3,464	£4,090	£4,929	£5,939	19.9%	41.6%	70.6%	71.4%
Zone 4: Andover - East	£2,776	£3,328	£3,929	£4,735	£5,705	19.9%	41.5%	70.6%	71.4%
Zone 5: Whitchurch	£3,099	£3,716	£4,387	£5,287	£6,371	19.9%	41.6%	70.6%	71.4%
Zone 6: Stockbridge	£3,188	£3,823	£4,514	£5,439	£6,554	19.9%	41.6%	70.6%	71.4%
Zone 7: Alderbury	£3,103	£3,721	£4,393	£5,293	£6,379	19.9%	41.6%	70.6%	71.4%
Zone 8: West Wellow	£3,064	£3,674	£4,337	£5,227	£6,298	19.9%	41.5%	70.6%	71.4%
Zone 9: Chandlers Ford	£3,088	£3,703	£4,372	£5,268	£6,348	19.9%	41.6%	70.6%	71.4%
Zone 10 and 11: Romsey	£3,082	£3,696	£4,364	£5,258	£6,336	19.9%	41.6%	70.6%	71.4%
Zone 12: North Baddesley	£3,004	£3,602	£4,253	£5,125	£6,175	19.9%	41.6%	70.6%	71.4%
Zone 13: Southampton Suburbs	£2,785	£3,340	£3,943	£4,752	£5,516	19.9%	41.6%	70.6%	65.1%
Zone 14: Totton	£3,057	£3,665	£4,328	£5,215	£6,054	19.9%	41.6%	70.6%	65.2%

Sources:

Experian local estimates for 2005 comparison goods expenditure per capita

(Excluding special forms of trading -6% in 2006, 7.8% in 2011 and beyond)

Experian Business Strategies - recommended forecast growth rates

(4.3% per annum between 2005 to 2010 and 3.3% per annum between 2010 and 2015, and 3.8% - 2015 to 2025)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2005 Prices)

Zone	2006	2011	2016	2021	2026	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021	Growth 2006-2026
Zone 1: Andover - N Hinterland	£116.48	£141.95	£169.79	£207.70	£254.50	21.9%	45.8%	78.3%	118.5%
Zone 2: Amesbury	£107.97	£131.30	£159.50	£196.71	£242.35	21.6%	47.7%	82.2%	124.5%
Zone 3: Andover - West	£56.56	£70.73	£81.87	£100.63	£122.09	25.0%	44.7%	77.9%	115.8%
Zone 4: Andover - East	£54.70	£64.86	£80.45	£98.89	£119.97	18.6%	47.1%	80.8%	119.3%
Zone 5: Whitchurch	£58.91	£72.66	£87.61	£106.42	£129.50	23.3%	48.7%	80.6%	119.8%
Zone 6: Stockbridge	£40.04	£48.74	£54.60	£67.10	£81.41	21.7%	36.4%	67.6%	103.3%
Zone 7: Alderbury	£61.24	£73.93	£88.05	£106.71	£129.61	20.7%	43.8%	74.3%	111.6%
Zone 8: West Wellow	£28.72	£35.46	£43.98	£54.36	£66.64	23.5%	53.1%	89.3%	132.1%
Zone 9: Chandlers Ford	£146.69	£180.92	£224.42	£276.49	£339.56	23.3%	53.0%	88.5%	131.5%
Zone 10 and 11: Romsey	£50.41	£60.52	£78.05	£95.91	£116.38	20.0%	54.8%	90.3%	130.8%
Zone 12: North Baddesley	£22.44	£27.77	£33.48	£41.15	£49.93	23.8%	49.2%	83.4%	122.5%
Zone 13: Southampton Suburbs	£146.52	£179.63	£213.43	£258.88	£301.69	22.6%	45.7%	76.7%	105.9%
Zone 14: Totton	£56.37	£67.45	£78.42	£93.02	£106.73	19.6%	39.1%	65.0%	89.3%
Total	**£947.05**	**£1,155.92**	**£1,393.65**	**£1,703.97**	**£2,060.36**	**22.1%**	**47.2%**	**79.9%**	**117.6%**

Sources: *Table 1B and Table 2B*

Table 3C: **Comparison Shopping Penetration Rates and Available Expenditure 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&11	Zone 12	Zone 13	Zone 14	Total Expenditure
Expenditure 2006	**£116.48**	**£107.97**	**£56.56**	**£54.70**	**£58.91**	**£40.04**	**£61.24**	**£28.72**	**£146.69**	**£50.41**	**£22.44**	**£146.52**	**£56.37**	**£947.05**
Market Share														
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%	
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%	
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%	
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	
District Total	**18%**	**32%**	**41%**	**54%**	**23%**	**49%**	**7%**	**39%**	**4%**	**46%**	**34%**	**7%**	**8%**	
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	
	100%	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total £M
Turnover £M														
Andover	£20.97	£34.55	£23.19	£29.54	£11.78	£16.02	£0.61	£0.57	£0.00	£0.00	£0.90	£0.00	£0.00	£138.12
Romsey	£0.00	£0.00	£0.00	£0.00	£1.77	£2.00	£3.67	£8.04	£5.87	£17.64	£2.24	£2.93	£2.82	£46.99
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.58	£0.00	£5.55	£4.49	£7.33	£1.69	£21.64
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.60
District Total	**£20.97**	**£34.55**	**£23.19**	**£29.54**	**£13.55**	**£19.62**	**£4.29**	**£11.20**	**£5.87**	**£23.19**	**£7.63**	**£10.26**	**£4.51**	**£208.35**
Outside District	£95.51	£73.42	£33.37	£25.16	£45.36	£20.42	£56.95	£17.52	£140.82	£27.22	£14.81	£136.26	£51.86	£738.70
Total	**£116.48**	**£107.97**	**£56.56**	**£54.70**	**£58.91**	**£40.04**	**£61.24**	**£28.72**	**£146.69**	**£50.41**	**£22.44**	**£146.52**	**£56.37**	**£947.05**

Sources: *Table 2C*
Colliers Erdman Lewis Retail Study 1998

Table 4C: **Comparison Shopping Penetration Rates and Available Expenditure 2011**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	:one 10&1	Zone 12	Zone 13	Zone 14	Total Expenditure
Expenditure 2011	**£141.95**	**£131.30**	**£70.73**	**£64.86**	**£72.66**	**£48.74**	**£73.93**	**£35.46**	**£180.92**	**£60.52**	**£27.77**	**£179.63**	**£67.45**	**£1,155.92**
Market Share														
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%	
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%	
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%	
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	
District Total	**18%**	**32%**	**41%**	**54%**	**23%**	**49%**	**7%**	**39%**	**4%**	**46%**	**34%**	**7%**	**8%**	
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	
	100%	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Total £M**
Turnover £M														
Andover	£25.55	£42.02	£29.00	£35.03	£14.53	£19.50	£0.74	£0.71	£0.00	£0.00	£1.11	£0.00	£0.00	£168.18
Romsey	£0.00	£0.00	£0.00	£0.00	£2.18	£2.44	£4.44	£9.93	£7.24	£21.18	£2.78	£3.59	£3.37	£57.14
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.19	£0.00	£6.66	£5.55	£8.98	£2.02	£26.41
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95
District Total	**£25.55**	**£42.02**	**£29.00**	**£35.03**	**£16.71**	**£23.88**	**£5.18**	**£13.83**	**£7.24**	**£27.84**	**£9.44**	**£12.57**	**£5.40**	**£253.68**
Outside District	£116.40	£89.29	£41.73	£29.84	£55.95	£24.86	£68.76	£21.63	£173.68	£32.68	£18.33	£167.05	£62.06	£902.24
Total	**£141.95**	**£131.30**	**£70.73**	**£64.86**	**£72.66**	**£48.74**	**£73.93**	**£35.46**	**£180.92**	**£60.52**	**£27.77**	**£179.63**	**£67.45**	**£1,155.92**

Sources: *Table 2C*
Colliers Erdman Lewis Retail Study 1998

Table 5C: **Comparison Shopping Penetration Rates and Available Expenditure 2016**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	:one 10&1	Zone 12	Zone 13	Zone 14	Total Expenditure
Expenditure 2016	**£169.79**	**£159.50**	**£81.87**	**£80.45**	**£87.61**	**£54.60**	**£88.05**	**£43.98**	**£224.42**	**£78.05**	**£33.48**	**£213.43**	**£78.42**	**£1,393.65**
Market Share														
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%	
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%	
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%	
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	
District Total	**18%**	**32%**	**41%**	**54%**	**23%**	**49%**	**7%**	**39%**	**4%**	**46%**	**34%**	**7%**	**8%**	
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	
	100%	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Total £M**
Turnover £M														
Andover	£30.56	£51.04	£33.57	£43.44	£17.52	£21.84	£0.88	£0.88	£0.00	£0.00	£1.34	£0.00	£0.00	£201.07
Romsey	£0.00	£0.00	£0.00	£0.00	£2.63	£2.73	£5.28	£12.31	£8.98	£27.32	£3.35	£4.27	£3.92	£70.79
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.96	£0.00	£8.59	£6.70	£10.67	£2.35	£32.26
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18
District Total	**£30.56**	**£51.04**	**£33.57**	**£43.44**	**£20.15**	**£26.75**	**£6.16**	**£17.15**	**£8.98**	**£35.90**	**£11.38**	**£14.94**	**£6.27**	**£306.31**
Outside District	£139.23	£108.46	£48.30	£37.01	£67.46	£27.85	£81.88	£26.83	£215.44	£42.15	£22.10	£198.49	£72.15	£1,087.34
Total	**£169.79**	**£159.50**	**£81.87**	**£80.45**	**£87.61**	**£54.60**	**£88.05**	**£43.98**	**£224.42**	**£78.05**	**£33.48**	**£213.43**	**£78.42**	**£1,393.65**

Sources: *Table 2C*
Colliers Erdman Lewis Retail Study 1998

Table 6C: **Comparison Shopping Penetration Rates and Available Expenditure 2021**

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Zone 10&1**	**Zone 12**	**Zone 13**	**Zone 14**	**Total Expenditure**
Expenditure 2021	**£207.70**	**£196.71**	**£100.63**	**£98.89**	**£106.42**	**£67.10**	**£106.71**	**£54.36**	**£276.49**	**£95.91**	**£41.15**	**£258.88**	**£93.02**	**£1,703.97**
Market Share														
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%	
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%	
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%	
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	
District Total	**18%**	**32%**	**41%**	**54%**	**23%**	**49%**	**7%**	**39%**	**4%**	**46%**	**34%**	**7%**	**8%**	
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	
	100%	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Total £M**
Turnover £M														
Andover	£37.39	£62.95	£41.26	£53.40	£21.28	£26.84	£1.07	£1.09	£0.00	£0.00	£1.65	£0.00	£0.00	£246.91
Romsey	£0.00	£0.00	£0.00	£0.00	£3.19	£3.35	£6.40	£15.22	£11.06	£33.57	£4.12	£5.18	£4.65	£86.74
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.89	£0.00	£10.55	£8.23	£12.94	£2.79	£39.41
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.68
District Total	**£37.39**	**£62.95**	**£41.26**	**£53.40**	**£24.48**	**£32.88**	**£7.47**	**£21.20**	**£11.06**	**£44.12**	**£13.99**	**£18.12**	**£7.44**	**£375.75**
Outside District	£170.32	£133.76	£59.37	£45.49	£81.94	£34.22	£99.24	£33.16	£265.43	£51.79	£27.16	£240.76	£85.58	£1,328.22
Total	**£207.70**	**£196.71**	**£100.63**	**£98.89**	**£106.42**	**£67.10**	**£106.71**	**£54.36**	**£276.49**	**£95.91**	**£41.15**	**£258.88**	**£93.02**	**£1,703.97**

Sources: *Table 2C*
Colliers Erdman Lewis Retail Study 1998

Table 7C: **Comparison Shopping Penetration Rates and Available Expenditure 2026**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&11	Zone 12	Zone 13	Zone 14	Total Expenditure
Expenditure 2026	**£254.50**	**£242.35**	**£122.09**	**£119.97**	**£129.50**	**£81.41**	**£129.61**	**£66.64**	**£339.56**	**£116.38**	**£49.93**	**£301.69**	**£106.73**	**£2,060.36**
Market Share														
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%	
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%	
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%	
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	
District Total	**18%**	**32%**	**41%**	**54%**	**23%**	**49%**	**7%**	**39%**	**4%**	**46%**	**34%**	**7%**	**8%**	
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%	
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	
	100%	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Total £M**
Turnover £M														
Andover	£45.81	£77.55	£50.06	£64.78	£25.90	£32.57	£1.30	£1.33	£0.00	£0.00	£2.00	£0.00	£0.00	£301.29
Romsey	£0.00	£0.00	£0.00	£0.00	£3.88	£4.07	£7.78	£18.66	£13.58	£40.73	£4.99	£6.03	£5.34	£105.07
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.00	£0.00	£12.80	£9.99	£15.08	£3.20	£47.07
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£3.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.26
District Total	**£45.81**	**£77.55**	**£50.06**	**£64.78**	**£29.78**	**£39.89**	**£9.07**	**£25.99**	**£13.58**	**£53.53**	**£16.98**	**£21.12**	**£8.54**	**£456.69**
Outside District	£208.69	£164.80	£72.03	£55.19	£99.71	£41.52	£120.53	£40.65	£325.97	£62.84	£32.95	£280.58	£98.19	£1,603.67
Total	**£254.50**	**£242.35**	**£122.09**	**£119.97**	**£129.50**	**£81.41**	**£129.61**	**£66.64**	**£339.56**	**£116.38**	**£49.93**	**£301.69**	**£106.73**	**£2,060.36**

Sources: *Table 2C*
Colliers Erdman Lewis Retail Study 1998

Table 8C: **Summary of Comparison Expenditure 2006 to 2026**

Centre	2006	2011	2016	2021	2026
Available Expenditure					
Andover	£138.12	£168.18	£201.07	£246.91	£301.29
Romsey	£46.99	£57.14	£70.79	£86.74	£105.07
Nursling Retail Park	£21.64	£26.41	£32.26	£39.41	£47.07
Stockbridge	£1.60	£1.95	£2.18	£2.68	£3.26
Total	**£208.35**	**£253.68**	**£306.31**	**£375.75**	**£456.69**
Benchmark Turnover of Existing Floorspace					
Andover	£137.89	£148.54	£160.02	£172.39	£185.71
Romsey	£38.22	£41.17	£44.36	£47.78	£51.48
Nursling Retail Park	£17.96	£19.35	£20.84	£22.45	£24.19
Stockbridge	£1.60	£1.72	£1.86	£2.00	£2.15
Total	**£195.67**	**£210.79**	**£227.08**	**£244.63**	**£263.53**
Commitments					
Andover - Asda	n/a	£10.17	£10.96	£11.80	£12.71
Romsey	n/a	n/a	n/a	n/a	n/a
Nursling Retail Park	n/a	n/a	n/a	n/a	n/a
Stockbridge	n/a	n/a	n/a	n/a	n/a
Total	**n/a**	**£10.17**	**£10.96**	**£11.80**	**£12.71**
Surplus Expenditure					
Andover	£0.24	£9.47	£30.10	£62.72	£102.87
Romsey	£8.77	£15.97	£26.43	£38.96	£53.59
Nursling Retail Park	£3.67	£7.06	£11.42	£16.95	£22.88
Stockbridge	£0.00	£0.23	£0.33	£0.68	£1.10
Total	**£12.68**	**£32.72**	**£68.27**	**£119.32**	**£180.44**
Floorspace (Sq m (Gross))					
Andover	n/a	2,343	6,915	13,378	20,367
Romsey	n/a	3,953	6,073	8,310	10,611
Nursling Retail Park	n/a	1,747	2,624	3,616	4,530
Stockbridge	n/a	56	75	146	218
Total	**n/a**	**8,099**	**15,688**	**25,449**	**35,726**

Sources: *Tables 3A, 3C to 11C*