Report

GVA
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Southampton & Eastleigh Retail Study

Retail Addendum for Test Valley

Test Valley Borough Council

April 2011

TEST VALLEY
BOROUGH COUNCIL

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For and on behalf of GVA Grimley Ltd

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1. Introduction

1.1 In December 2010, GVA was instructed by Southampton City Council and Eastleigh Borough Council to prepare a joint Retail Study that will inform retail planning in Southampton and Eastleigh during the period up to 2026.

1.2 In addition to the main study, GVA were also appointed by Test Valley Borough Council to provide a descriptive analysis of current shopping patterns across the southern parts of Test Valley Borough. Drawing on the up-to-date household survey evidence, we have specifically examined the settlements of Romsey, North Baddesley, Valley Park/Knightwood, Nursling & Rownhams and Chilworth situated in the Southern Test Valley (STV) area of the Borough (part of South Hampshire), and analysed patterns of retail behaviour of residents living within these settlements in order to provide a detailed overview of shopping patterns and cross-boundary interaction between Test Valley, Southampton and Eastleigh.

1.3 This report sets out the key findings of our analysis and forms an addendum to the Southampton & Eastleigh Retail Study.

1.4 Should you require any further information, please contact:

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2. Methodology

2.1 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the recent household telephone survey (January 2011) of existing shopping patterns to model the existing flow of available expenditure from the Southern Test Valley region to retail centres and stores in Southampton and Eastleigh. In order to establish current shopping patterns, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the household survey area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis that the 2011 household telephone survey of shopping patterns, so as to determine flows of expenditure and the respective market share of centres/stores.

Data Inputs

Survey Area and Household Survey

2.2 Our analysis draws upon the results of the telephone survey of 2,600 households undertaken to inform the Southampton & Eastleigh Retail Study. GVA designed the survey in consultation with the Councils and Nems Market Research – who undertook interviewing and data processing in January 2011.

2.3 The survey area, illustrated by Plan 1, is broken down into 28 zones. There is a degree of overlap between the zone boundaries and the administrative boundaries of the three Councils. However, for the purposes of our analysis we consider Zones 6-12 are those which most closely relate to Test Valley although they do include some parts of Eastleigh and Southampton e.g. Chandler's Ford, Basset and Lordshill.

2.4 For the purpose of our analysis, Zones 6-12 are collectively referred to as the 'Southern Test Valley' study area which is the focus of this report. Zone 26 is also relevant to our analysis, although it should be acknowledged only half of this zone falls within Test Valley Borough and is outside of Southern Test Valley.

2.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as "internet", to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included questions on main-food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type.

2.6 For food we used a 75%/25% food/top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey Zone. The survey also includes five questions on specific comparison goods types, which coincides with Experian Business Strategies definitions of comparison goods expenditure. The retail modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita spend on that goods type. This process establishes pattern of residents spending for each Zone in terms of the following types of goods:

- clothing and footwear;
- furniture, floor coverings and household textiles;
- DIY and decorating supplies;
- domestic and small electrical appliances (tv, hi-fi, radio, etc);
- personal goods (jewellery, glassware, books, stationary, gardening, pet related products, recreational and sporting goods).

Estimates of Population

2.7 Population estimates and forecasts were drawn from the Experian e-marketer in-house system. This provides estimates of population based on trendline projections and the 2001 census for small, localised areas. The estimated population within Southern Test Valley (Zones 6-12) is currently 61,277 (including those parts of the Zones which lie within Eastleigh and Southampton – see Paragraph 2.3). The estimated population in Zone 26 which, as highlighted above only partly falls within Test Valley Borough, is currently 25,170.

Available Expenditure

2.8 The Experian e-marketer system provides estimates of the per capita expenditure for convenience and comparison goods in 2009 prices. We have made deductions for special forms of trading (SFT) which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping based on the most up to date information provided by Experian. We have applied individual per capita expenditure figures for each Zone to provide a more detailed understanding of available expenditure in different parts of Southern Test Valley.

2.9 We have applied growth rates for comparison goods of 0.4% for the period 2009 to 2010 and 1.2% for the period 2010 to 2011 to establish the baseline position of expenditure flows. For convenience goods we use growth rates of 0.3% between 2009 and 2010 and 0% between 2010 and 2011.

2.10 By applying per capita expenditure within each zone to the current population estimates (2011) we have generated expenditure by Zone to highlight variations across Southern Test Valley. Table 2.1 below sets out the total available expenditure generated within the Southern Test Valley Zones and Zone 26 for convenience and comparison goods.

2.1: Southern Test Valley Retail Expenditure (2011)

	Population 2011	Convenience Goods Spend (£000)	Comparison Goods Spend (£000)
Zone 6	1,687	£3,159	£4,714
Zone 7	12,239	£22,379	£32,255
Zone 8	6,065	£12,813	£20,243
Zone 9	14,175	£26,069	£40,369
Zone 10	7,566	£13,499	£20,080
Zone 11	1,347	£2,765	£4,411
Zone 12	18,198	£33,748	£50,762
Sub-Total	**61,277**	**£114,432**	**£172,835**
Zone 26	25,170	£51,574	£80,647

Source: Experian Business Solutions, February 2011

2.11 In the following sections of this report we set out our detailed analysis of shopping patterns of residents within Southern Test Valley, focussing in particular on the relationship and cross-border interactions with retail centres and key stores within Southampton and Eastleigh.

3. Convenience Goods Shopping Patterns

3.1 Convenience shopping provision within the Southern Test Valley settlements is predominantly small-scale, with the exception of the Waitrose in Romsey Town Centre which has a sales area of 1,932 sqm net. There are several other, smaller-scale convenience stores in the town centre including two Co-ops (one since closed) and an Aldi supermarket. Outside the town centre there are various small-scale stores including several Co-ops elsewhere in Romsey, a Co-op in Nursling, a Co-op in North Baddesley and a Tesco Express in Valley Park (the location of these stores is illustrated on Plan 2).

3.2 Using the household survey results, we have modelled the convenience goods trade draw to these centres/stores from within Zones 6-12 which comprises the Southern Test Valley study area. It is evident from our analysis that these stores collectively draw approximately 23% of the total available expenditure generated within Zones 6-12. This is a relatively low level of trade retention and indicates reasonably high leakage to other centres/stores beyond the Southern Test Valley area.

3.3 As demonstrated by Table 3.1 below, Romsey has the greatest influence over the Southern Test Valley Zones, particularly in Zone 12 (the centre's location zone), and to a lesser extent Zones 10, 11 and 26. This is predominantly attributable to the Waitrose store which alone draws 66% available expenditure generated within the study area (Zones 6-12).

3.1: Southern Test Valley Convenience Goods Allocation (% Market Share)

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 26
Romsey	5.2%	1.1%	5.6%	0.8%	20.2%	38.4%	55.1%	12.3%
Valley Park	-	-	-	7.5%	-	-		-
North Baddesley	-	-	-	-	1.9%	-		0.4%
Nursling	16.3%	1.5%	-	-	-	-		-

Source: Household Telephone Survey, January 2011

3.4 Reflecting the smaller scale of other provision, other stores in Valley Park, North Baddesley and Nursling are less influential over the Southern Test Valley area and generally serve a more limited, local catchment.

3.5 As highlighted by the table above, there is evidently a reasonable degree of trade leakage from the Southern Test Valley Zones to other centres/stores in the wider area e.g. within Southampton and Eastleigh. Table 3.2 below demonstrates the key centres/stores beyond the Southern Test Valley study area which have an influence over convenience shopping patterns in the Zones 6-12.

3.2: Competing Centres/Store Convenience Goods Allocation (% Market Share)

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Lordshill District Centre	43.4%	68.3%	6.2%	1.1%	23.9%	4.0%	4.1%
Asda, Bournemouth Road	3.0%	6.2%	19.0%	48.2%	23.3%	15.8%	15.7%
Fryern Centre, Chandler's Ford	-	-	5.6%	24.3%	3.2%	10.2%	-
Tesco, Tebourba Way	12.0%	5.5%	15.6%	-	-	-	0.8%
Sainsbury's/M&S, Tollbar Way	3.0%	-	6.3%	2.7%	1.6%	-	0.8%
Shirley Town Centre	-	1.9%	7.9%	0.8%	1.6%	-	-
Southampton City Centre	-	0.8%	6.5%	-	1.6%	-	-
Portswood District Centre	-	-	16.0%	-	-	-	-
Eastleigh Town Centre	-	-	-	4.1%	-	-	0.8%
Tesco, Bursledon	-	-	-	0.8%	-	-	-
Asda, Totton	3.0%	5.5%	-	-	-	-	-
Morrisons, Totton	4.1%	1.5%	-	0.8%	3.2%	-	3.3%
Sainsbury's, Badger Farm, Winchester	-	-	-	3.2%	-	7.9%	4.1%
Sainsbury's, Winchester City Centre	-	-	-	-	-	4.0%	0.3%
Tesco, Easton Lane, Winchester	-	-	-	1.6%	-	-	-
Tesco, Bourne Centre, Salisbury	3.0%	-	-	-	-	-	-

Source: Household Telephone Survey, January 2011

3.6 In order to explore in detail the relative shopping patterns from certain settlements within Test Valley we discuss each in turn below.

Zone 6 – Nursling

3.7 We estimate that there is currently a resident population of c.1,687 in Zone 6 which is generating c.3.2m convenience goods expenditure in 2011. As highlighted above, 5.2% of this spend is currently drawn to the stores in Romsey town centre whilst 16.3% is drawn to the Co-op in Nursling. It is evident from the survey results that the latter is entirely attributable to top-up food shopping which highlights the importance of this local provision in this geographic location.

3.8 Whilst the Waitrose in Romsey is attracting a small proportion of main-food shopping trips from Zone 6, the majority of residents are choosing to travel to the Sainsbury's in Lordshill district centre and the out-of-centre Tesco on Tebourba Way to fulfil their main-food shopping needs. To a lesser degree, the Sainsbury, Tollbar Way and the Asda, Bournemouth Road, are also serving the main-food shopping needs of residents in Zone 6. This indicates that a significant amount of main-food convenience goods expenditure is being lost outside of the Southern Test Valley area. Identified shopping patterns within Zone 6 are summarised in Table 3.3 below.

3.3: Zone 6 (Nursling) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Co-op, Nursling	-	65.2%	16.3%
Waitrose, Romsey	4.0%	4.4%	4.1%
Aldi, Romsey	0.0%	4.4%	1.1%
Sainsbury's, Lordshill	**52.0%**	**17.4%**	**43.4%**
Tesco, Tebourba Way	16.0%	-	12.0%
Asda, Bournemouth Rd	4.0%	-	3.0%
Sainsbury's, Tollbar Way	4.0%	-	3.0%
Morrisons, Totton	4.0%	4.4%	4.1%
Asda, Totton	4.0%	-	3.0%
Tesco, Bourne Centre, Salisbury	4.0%	-	3.0%

Source: Household Telephone Survey, January 2011

Zone 7 – Rownhams

3.9 We estimate the current resident population in Zone 7 is 12,239. Based on the average per capita spend within this zone, we estimate that this population is currently generating c.£22.4m per annum. According to the survey results, only a small percentage of this spend is being drawn to convenience goods stores in Romsey (1.1%) and Nursling (1.5%). Within Zone 7, the Test Valley centres (Romsey and Nursling) achieve the lowest market shares. Instead, the majority of spend is drawn to the Sainsbury's store in Lordshill (Southampton) which is not surprising given that the store is also located within Zone 7.

3.10 Reflecting the location of Zone 7, which covers part of Southampton, other centres/stores within Southampton are serving the needs of residents within the Zone. These include the out-of-centre Tesco, Tebourba Way, Shirley Town Centre and to a lesser degree the M&S at West Quay, Southampton City Centre. The Asda, Bournemouth Road in Eastleigh Borough is also drawing some trade from within Zone 7, as highlighted in Table 3.4 below.

3.4: Zone 7 (Rownhams) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Co-op, Nursling	-	6.1%	1.5%
Waitrose, Romsey	1.0%	-	0.8%
Local Shops, Romsey	-	1.5%	0.4%
Sainsbury's, Lordshill	**69.8%**	**63.6%**	**68.3%**
Asda, Bournemouth Rd	8.3%	-	6.2%
Tesco, Tebourba Way	7.3%	-	5.5%
Shirley Town Centre	-	7.5%	1.9%
M&S, West Quay	-	3.0%	0.8%
Asda, Totton	7.3%	-	5.5%
Morrisons, Totton	1.0%	3.0%	1.5%

Source: Household Telephone Survey, January 2011

Zone 8 – Chilworth

3.11 We estimate that the current resident population in Zone 8 is 6,065. Based on the average per capita spend within this zone, we estimate that this population is currently generating c.£12.8m convenience goods expenditure. The survey results show that only 5.6% of this spend is currently drawn to foodstores in Romsey town centre. In Romsey, the Waitrose is attracting some main-food shopping trips, whilst the Co-op is catering for top-up food shopping needs.

3.12 It is apparent that the majority of residents from within Zone 8 are choosing to travel to Asda, Bournemouth Road and Portswood District Centre for both main-food and top-up food shopping. Tesco, Tebourba Way is also attracting a strong combined market share from Zone 8, and obtains the highest market share for main-food shopping. All of these supermarkets are located outside of Zone 8. Identified shopping patterns within Zone 8 are summarised in Table 3.5 below.

3.5 Zone 8 (Chilworth) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Waitrose, Romsey	6.3%	-	4.7%
Co-op, Romsey	-	3.3%	0.8%
Asda, Bournemouth Rd	**18.7%**	**20.0%**	**19.0%**
Portswood District Centre	**12.5%**	**26.6%**	**16.0%**
Tesco, Tebourba Way	**20.8%**	**-**	**15.6%**
Shirley Town Centre	8.3%	6.6%	7.9%
Southampton City Centre	4.2%	13.3%	6.5%
Sainsbury's/M&S, Tollbar Way	8.4%	-	6.3%
Sainsbury's, Lordshill	8.3%	-	6.2%
Waitrose, Chandler's Ford	6.3%	3.3%	5.6%

Source: Household Telephone Survey, January 2011

3.13 Asda, Bournemouth Road is easily accessible by car from Chilworth and Bassett. Portswood District Centre and Tesco, Tebourba Way are located south of the Zone, within the boundary of Southampton City Council. It is apparent that residents from Zone 8 are more likely to travel southwards for food shopping rather than northwards to Romsey, which may be due to the slightly closer proximity of the Southampton food stores in relation to this Zone.

Zone 9 – Valley Park

3.14 We estimate that there is a current residential population of 14,175 in Zone 9. The population is generating c.£26.1m convenience goods expenditure per annum. As highlighted below, 7.5% of this spend is currently drawn to Valley Park whilst 0.8% of this spend is drawn to the stores in Romsey town centre. It is evident from the survey results below that only 1.1% is attributable to main-food shopping in both Tesco Express and Waitrose, whilst the Tesco Express draws 26.8% of top-up food shopping. It is apparent that the Tesco Express serves a local need for top-up food shopping which does not extend to cater for main-food shopping.

3.15 Zone 9 is split across both Test Valley and Eastleigh Borough and as such, foodstores in Eastleigh are drawing a relatively high proportion of trade generated within this zone. The Asda, Bournemouth Road is clearly the dominant main-food shopping destination (55.3%) but is also serving a top-up shopping function. Chandler's Ford district centre is also attracting a relatively high market share, again attributable to both main and top-up food shopping. This is illustrated in Table 3.6 below.

3.6 Zone 9 (Valley Park/Knightwood) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Tesco Express, Valley Park	1.1%	26.8%	7.5%
Waitrose, Romsey	1.1%	-	0.8%
Asda, Bournemouth Rd	**55.3%**	**26.4%**	**48.2%**
Chandler's Ford District Centre*	**22.3%**	**30.4%**	**24.3%**
Eastleigh Town Centre	4.3%	3.6%	4.1%
Sainsbury's, Tollbar Way	3.2%	1.2%	2.7%
Sainsbury's, Lordshill	1.1%	1.2%	1.1%
Shirley Town Centre	1.1%	-	0.8%
Tesco, Bursledon	1.1%	-	0.8%
Sainsbury's, Badger Farm, Winchester	4.3%	-	3.2%
Tesco, Easton Lane, Winchester	2.1%	-	1.6%
Morrisons, Totton	1.1%	-	0.8%

Source: Household Telephone Survey, January 2011 *includes Waitrose and Co-op, Fryern Centre

Zone 10- North Baddesley

3.16 We estimate that there is a current residential population of 7,566 in Zone 10 which is generating approximately £13.5m convenience goods expenditure. As highlighted below, stores in Romsey draw approximately 20% of this expenditure, whilst 1.9% is drawn to the Co-op in North Baddesley. It is evident from the survey results that Romsey town centre is performing both a main-food and top-up food shopping function, whilst the Co-op in North Baddesley is generally only serving top-up shopping needs in this zone.

3.17 Instead, the majority of residents are choosing to travel to the Sainsbury's in Lordshill and the out-of-centre Asda, Bournemouth Road to fulfil their main-food shopping requirements. The Asda is also serving a top-up food shopping role. These shopping patterns reflect the proximity of these stores to Zone 10. It is also possible that these stores, which are both significantly larger than foodstore provision currently located in Romsey town centre, have a more attractive offer in terms of the price and range of goods on offer compared to Romsey.

3.7 Zone 10 (North Baddesley) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Waitrose, Romsey	12.8%	11.5%	12.5%
Aldi, Romsey	6.4%	-	4.8%
Local Shops, Romsey	-	11.5%	2.9%
Co-op, North Baddesley	-	7.7%	1.9%
Sainsbury's, Lordshill	**31.9%**	**-**	**23.9%**
Asda, Bournemouth Road	**29.8%**	**3.8%**	**23.3%**
Chandler's Ford District Centre*	4.2%	-	3.2%
Asda, The Marlands	2.1%	-	1.6%
Sainsbury's, Shirley	2.1%	-	1.6%
Sainsbury's, Tollbar Way	2.1%	-	1.6%
Morrisons, Totton	4.3%	-	3.2%

Source: Household Telephone Survey, January 2011 *includes Waitrose and Co-op, Fryern Centre

Zone 11 – Rural Romsey / Rural Ampfield

3.18 Zone 11 has the smallest population of the Zones within the Test Valley Borough Area, and we estimate the resident population is currently 1,347. Based on the average per capita spend within this zones, we estimate that this population is currently generating around £2.8m.

3.19 This zone is largely rural in nature, and lies between Romsey and North Baddesley. Reflecting the close proximity of Romsey, the town centre draws 38% of expenditure generated within this zone. This is largely attributed to the Waitrose which draws the highest market share for main-food and top-up food shopping. The Aldi in Romsey also achieves a reasonable market share within this zone.

3.20 Outside Test Valley, the Asda, Bournemouth Road also attracts a high market share in terms of main-food shopping. Stores at Chandler's Ford are also drawing a reasonable proportion of trade in respect of both main-food and top-up food shopping. Both are located to the south east of Zone 11 and are therefore most likely to be frequented by residents living within the eastern half of the zone.

3.8 Zone 11 (Rural Romsey / Rural Ampfield) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Waitrose, Romsey	**36.8%**	**18.2%**	**32.2%**
Aldi, Romsey	5.3%	9.1%	6.3%
Asda, Bournemouth Road	**21.1%**	**-**	**15.8%**
Chandler's Ford	10.5%	9.1%	10.2%
Sainsbury's, Lordshill	**5.3%**	**-**	4.0%
Sainsbury's, Badger Farm, Winchester	10.5%	-	7.9%
Sainsbury's, Winchester City Centre	5.3%	**-**	4.0%

Source: Household Telephone Survey, January 2011

Zone 12– Romsey

3.21 We estimate that there is currently a resident population of c.18,198 within Zone 12. Based on the average per capita spend within this zone, we estimate that this population is currently generating around £33.7m convenience goods expenditure.

3.22 As previously highlighted in Table 3.1, Romsey town centre draws the majority of convenience goods expenditure generated within this zone (55%). On closer analysis, it is evident that this is largely attributed to the Waitrose store which has a 41.5% market share in Zone 12. The store is performing a key function in terms of both main-food and top-up food shopping. The Aldi supermarket is also performing both a main and top-up food shopping role, whereas the Co-op and the other local shops in the town are generally only serving top-up food shopping needs.

3.23 As highlighted in Table 3.9 below, the out-of-centre Asda, Bournemouth Road is also attracting trade from Zone 12, although only in respect of main-food shopping. Despite being an approximate 10km drive from Romsey town centre, the Asda draws the second highest main-food market share within Zone 12 (20.9%). It is possible that the Asda is more attractive in terms of its lower price offer than the Waitrose in Romsey town centre. The same could be said of the Sainsbury's, Lordshill which attracts a 4.1% market share from Zone 12, despite being approximately 8km south of Romsey town centre.

3.9 Zone 12 (Romsey) Convenience Goods Shopping Patterns

	Main-food (%)	Top-Up (%)	Combined Market Share
Waitrose, Romsey	45.1%	30.7%	41.5%
Co-op, Romsey	1.1%	8.0%	2.8%
Aldi, Romsey	5.5%	9.3%	6.5%
Local Shops, Romsey	-	17.3%	4.3%
Asda, Bournemouth Road	**20.9%**	**-**	**15.7%**
Sainsbury's, Lordshill	5.5%	4.1%	4.1%
Eastleigh Town Centre	1.1%	-	0.8%
Sainsbury's, Tollbar Way	1.1%	-	0.8%
Tesco, Tebourba Way	1.1%	-	0.8%
Sainsbury's, Badger Farm, Winchester	5.5%	-	4.1%
Morrisons, Totton	4.4%	-	3.3%
Sainsbury's, Winchester City Centre	-	1.3%	0.3%

Source: Household Telephone Survey, January 2011

4. Comparison Goods Shopping Patterns

4.1 Comparison shopping provision within the Southern Test Valley settlements is predominantly located within Romsey town centre. According to the latest Experian Goad Category Report (March 2010), Romsey town centre comprises approximately 29,607 sqm gross retail and leisure floorspace across c.146 units. As we would expect, there is generally a more limited comparison shopping offer in the smaller centres and we have therefore focussed our analysis on Romsey.

4.2 Drawing on the results of the household survey, we have modelled the comparison goods trade draw to Romsey and also to the competing centres of Southampton and Eastleigh. It is evident from our analysis that Romsey draws approximately 11.9% of the total available comparison goods expenditure generated within Zone 6-12. This is a relatively low level of trade retention and indicates reasonable leakage to other centres/stores beyond the Southern Test Valley area.

4.3 As demonstrated by Table 4.1 below, Romsey has the strongest influence in Zone 12 (the centre's location zone), and also Zones 6, 10 and 11. However its influence over Zones 7, 8 and 9 is more limited. This reflects the proximity of competing provision, notably Southampton and to a lesser extent, Eastleigh, which together draw 53.7% of total comparison goods expenditure generated within the Southern Test Valley zones.

4.1: Southern Test Valley Comparison Goods Allocation (% Market Share)

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 26
Romsey	10.6%	1.9%	4.8%	1.2%	20.4%	31.8%	24.5%	2.5%
Southampton	61.4%	59.2%	62.5%	39.3%	42.5%	29.7%	43.8%	30.8%
Eastleigh	0.0%	0.5%	2.1%	13.0%	7.4%	4.8%	5.2%	0.2%
Southampton Out-of-Centre	2.7%	10.4%	7.9%	2.0%	3.8%	1.7%	3.6%	0.8%
Eastleigh Out-of-Centre	7.4%	5.0%	9.4%	21.7%	6.8%	11.1%	4.8%	1.5%

Source: Household Telephone Survey, January 2011

4.4 Our more focussed analysis on the attraction of each centre in respect of the different good categories is set out below.

Romsey Town Centre

4.5 As highlighted in Table 4.1 above, Romsey is currently attracting the majority of its trade from Zones 10-12. Closer analysis indicates that this the centre is largely drawing spend on clothing, footwear and fashion goods and personal and luxury items (e.g. books, jewellery etc.). The centre is also drawing some trade in respect of home furnishings and electrical appliances but has a more limited draw for DIY and decorating goods. These shopping patterns reflect the type of comparison goods on offer in the centre as well as the proximity of competing provision in both Southampton and Eastleigh e.g. B&Q, Channon Retail Park and Homebase, Millbrook,

4.2: Romsey Town Centre – Comparison Goods Trade Draw by Goods Category

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Clothing, Footwear and Fashion	16.7%	3.5%	4.8%	-	14.9%	15.8%	16.8%
Furniture, Floor Coverings and Household Textiles	-	-	3.6%	-	11.5%	6.3%	16.4%
DIY and Decorating	-	-	-	-	2.6%	4.8%	5.9%
Domestic & Small Electrical Appliances inc TV, Hi-fi etc.	10.0%	-	3.1%	-	10.8%	6.3%	9.1%
Personal and Luxury Goods	13.3%	3.6%	7.7%	3.8%	40.0%	81.2%	50.7%
Weighted Market Share	**10.6%**	**1.9%**	**4.8%**	**1.2%**	**20.4%**	**31.8%**	**24.5%**

Source: Household Telephone Survey, January 2011

Southampton City Centre

4.6 Reflecting Southampton's prominent position in the sub-region and the strength of its attraction as a retail shopping destination, the city centre has a significant influence over Southern Test Valley. As highlighted in Tables 4.1 and 4.3, the City achieves market shares between 30-63% across Zones 6-12.

4.7 Closer analysis indicates that the centre has a particularly high draw across all comparison goods categories, with the exception of DIY and decorating goods which are markedly lower. This reflects the centre's more limited offer within this goods category as well as the proxmity of competing out-of-centre provision.

4.3: Southampton City Centre – Comparison Goods Trade Draw by Goods Category

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Clothing, Footwear and Fashion	66.7%	83.7%	80.9%	53.8%	53.2%	57.9%	61.1%
Furniture, Floor Coverings and Household Textiles	81.4%	52.0%	71.3%	39.1%	34.6%	37.5%	40.3%
DIY and Decorating	-	2.5%	2.5%	2.2%	2.6%	4.8%	3.6%
Domestic & Small Electrical Appliances inc TV, Hi-fi etc.	50.0%	39.1%	46.8%	30.4%	35.1%	43.9%	48.5%
Personal and Luxury Goods	73.4%	75.0%	73.0%	45.2%	53.4%	-	38.1%
Weighted Market Share	**61.4%**	**59.2%**	**62.5%**	**39.3%**	**42.5%**	**29.7%**	**43.8%**

Source: Household Telephone Survey, January 2011

Eastleigh Town Centre

4.8 Eastleigh town centre is less influential in terms of trade draw across the Southern Test Valley zones. The centre is largely attracting trade from Zone 9, across all comparison goods categories as highlighted in Table 4.4 below.

4.4: Eastleigh Town Centre – Comparison Goods Trade Draw by Goods Category

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Clothing, Footwear and Fashion	-	2.3%	-	14.0%	8.5%	-	4.2%
Furniture, Floor Coverings and Household Textiles	-	-	-	9.4%	3.8%	6.3%	3.0%
DIY and Decorating	-	-	-	3.4%	-	9.5%	1.2%
Domestic & Small Electrical Appliances inc TV, Hi-fi etc.	-	-	3.1%	7.2%	10.8%	12.5%	6.1%
Personal and Luxury Goods	-	-	3.9%	20.8%	6.7%	-	7.0%
Weighted Market Share	**-**	**0.5%**	**2.1%**	**13.0%**	**7.4%**	**4.8%**	**5.2%**

Source: Household Telephone Survey, January 2011

4.9 The centre also draws a small proportion of trade (5.2%) from Zone 12 which is surprising given the proximity of Romsey town centre to those living within this zone. This would tend to suggest that Romsey town centre is not fully satisfying the needs of certain residents within Zone 12, who are instead choosing to travel further afield to Eastleigh.

Out-of- Centre Retail Provision

4.10 We have also analysed the trade draw patterns to the out-of-centre retail warehousing provision located in Southampton and Eastleigh, which includes the following:-

Southampton:

- **Millbrook Road** is located next to the Millbrook flyover, at the junction between the A3024 and the A35 Tebourba Way. There are two retail warehouse units occupied by Homebase and Comet**.**
- Other retail warehouse provision is located on **Winchester Road**, to the north east of Shirley. There are five retail warehouse units here, occupied by Halfords, Currys, Pets at Home, The Range and Wickes.

Eastleigh:

- At **Hedge End** there is a large concentration of 18 retail warehouse units which include retailers such as B&Q, M&S, Wickes, Currys, Homebase and PC World amongst others.
- **Channon Retail Park** is located off Woodside Avenue to the west of Eastleigh town centre. The Retail Park comprises five units occupied by Halfords, Comet, Pets at Home, Matalan and B&Q.
- **Chestnut Avenue Retail Park** is located to the south of Chandler's Ford district centre, in close proximity to the Asda on Bournemouth Road. The retail park comprises three units occupied by Homebase, Dreams and Nevada Bob.
- There is also a standalone retail warehouse unit located on School Lane, again close to Chandler's Ford District Centre, which is occupied by **Peter Green**.

4.11 Tables 4.5 and 4.6 set out the trade draw patterns of the above retail warehouse provision and their influence over the Southern Test Valley zones.

4.5: Southampton Out-of-Centre – Comparison Goods Trade Draw by Goods Category

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Clothing, Footwear and Fashion	-	-	-	-	-	-	-
Furniture, Floor Coverings and Household Textiles	-	2.0%	3.6%	-	3.8%	-	1.5%
DIY and Decorating	-	18.8%	22.5%	1.1%	5.1%	-	2.4%
Domestic & Small Electrical Appliances inc TV, Hi-fi etc.	10.0%	32.8%	21.9%	7.3%	10.8%	6.3%	12.1%
Personal and Luxury Goods	-	-	-	-	-	-	-
Weighted Market Share	**2.7%**	**10.4%**	**7.9%**	**2.0%**	**3.8%**	**1.7%**	**3.6%**

Source: Household Telephone Survey, January 2011

4.6: Eastleigh Out-of-Centre – Comparison Goods Trade Draw by Goods Category

	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Clothing, Footwear and Fashion	8.3%	5.8%	11.9%	14.0%	14.9%	15.8%	1.1%
Furniture, Floor Coverings and Household Textiles	12.5%	14.0%	10.7%	14.1%	7.7%	12.5%	14.9%
DIY and Decorating	-	2.5%	12.5%	68.6%	15.4%	14.3%	3.6%
Domestic & Small Electrical Appliances inc TV, Hi-fi etc.	15.0%	4.7%	12.5%	42.1%	5.4%	18.8%	9.1%
Personal and Luxury Goods	-	1.8%	3.9%	1.9%	-	-	-
Weighted Market Share	**7.4%**	**5.0%**	**9.4%**	**21.7%**	**6.8%**	**11.1%**	**4.8%**

Source: Household Telephone Survey, January 2011

4.12 Reflecting the type of bulky-goods offered by the out-of-centre retail warehousing in Southampton, these stores only generally attracting spend on electrical appliances, DIY and decorating and to a lesser degree, on household furnishings. In contrast, out-of-centre retail provision in Eastleigh has a greater influence across all comparison goods categories, notably clothing and footwear, which achieves greater market shares within Test Valley than Eastleigh town centre. This is entirely attributed to the M&S store at Hedge End which is evidently a strong attraction. The influence of Eastleigh's out-of-centre provision is also reflective of the scale of provision on offer, particularly at Hedge End.

5. Overview

5.1 Based on our analysis of shopping patterns in Southern Test Valley, is it apparent that Romsey town centre has the greatest influence over the study area in terms of convenience goods (Zones 6-12). The town centre has a relatively strong core catchment, comprising Zones 10-12, and is currently performing an important role serving both the main-food and top-up food shopping needs within this catchment. The centre has less influence over the wider area, comprising Zones 6-9, although this is consistent with the proximity of other centres/stores and the overlap of catchments.

5.2 Across Zones 6-9 other small-scale convenience goods provision within Test Valley (e.g. Tesco Express, Valley Park and Co-op in Nursling and North Baddesley) are generally performing a more local, top-up food shopping function, serving the day-to-day needs of Test Valley's settlements. However, for main-food shopping it is evident that, those living within these zones are most likely to travel outside of the Borough to fulfil their main-food shopping needs e.g. to larger foodstore provision located within Southampton and Eastleigh Boroughs, notably Asda, Bournemouth Road, Sainsbury's, Lordshill.

5.3 In terms of comparison shopping, whilst Romsey has a relatively strong influence over its immediate catchment (Zones 10-12), the proximity of Southampton and the strength of its comparison shopping offer has a stronger overall influence across the Southern Test Valley zones. Reflecting its higher-order offer, the city centre is particularly popular in terms of the clothing and footwear and personal and luxury goods categories.

5.4 Eastleigh town centre is less influential. However, it does still draw a reasonable proportion of trade from the Southern Test Valley area. Notably, the town centre attracts a small proportion of trade from Zone 12 which would suggest that Romsey, being the closer centre, is not fully satisfying the needs of those within it immediate catchment.

5.5 The out-of-centre retail warehouse provision in Southampton and Eastleigh is also influencing comparison shopping patterns in Southern Test Valley. The more typical bulky-goods retail warehouse provision in Southampton is largely attracting spend within the electrical appliances and DIY/decorating good categories. In contrast, the greater concentration of out-of-centre retail provision in Eastleigh, notably at Hedge End, is more influential across all comparison goods categories. The M&S at Hedge End is a particularly significant attractor.

Plan 1
Study Area & Household Telephone Survey Zones

Southampton & Eastleigh Retail Study

Study Area & Household Telephone Survey Zones

KEY

District/Borough Boundary

Study Area

Survey Zone

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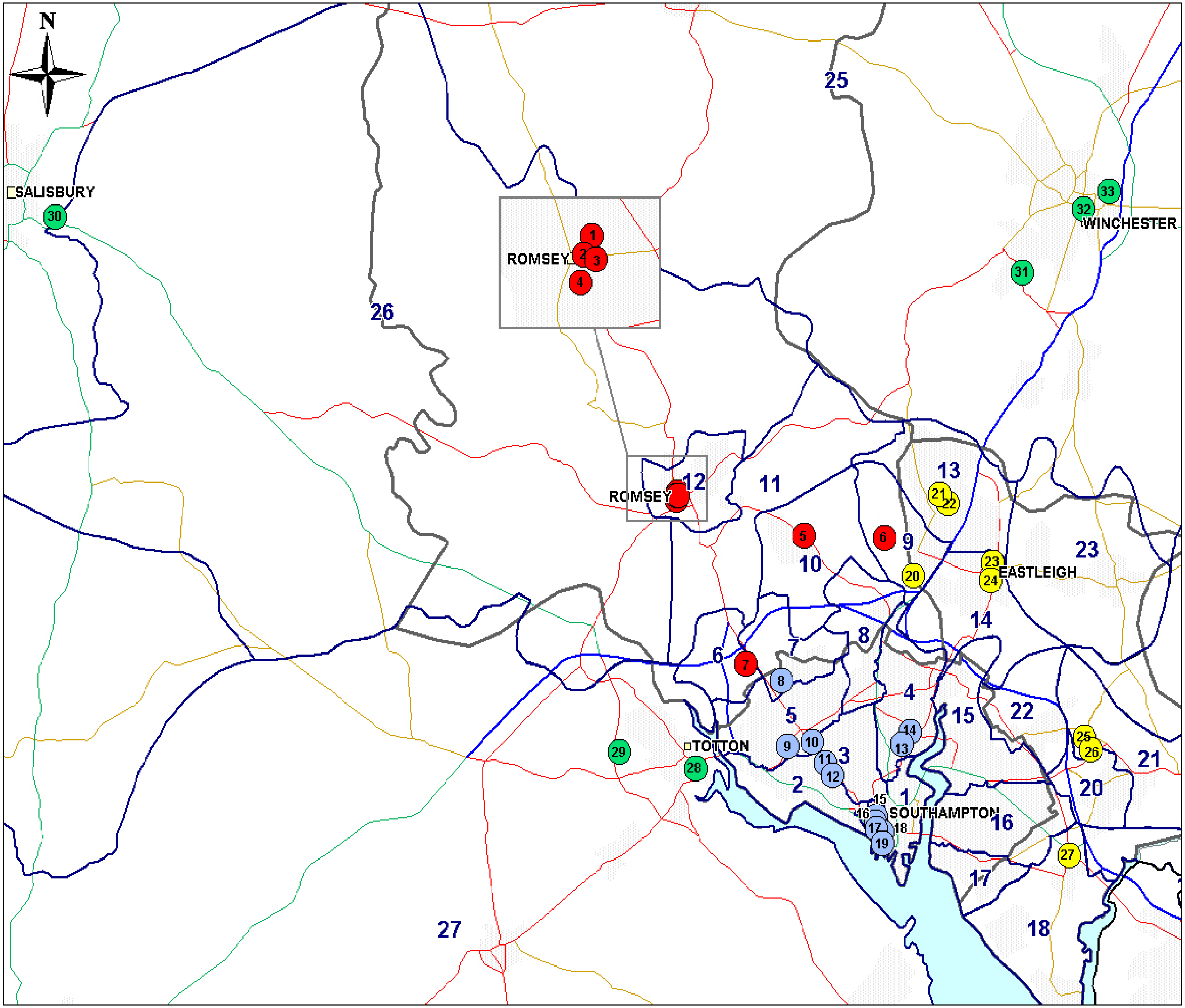
Plan 2
Existing Foodstore Provision



Food stores in Test Valley & surrounding areas

Test Valley Stores

1 Waitrose, Romsey
2 Co op, The Hundred, Romsey
3 Aldi, The Hundred, Romsey
4 Co op, Dukes Mill Centre, Romsey
5 Co op, Botley Rd, North Baddesley
6 Tesco Express, Valley Park
7 Co op, Nursling

Southampton Stores

8 Sainsburys, Lordshill DC
9 Tesco, Tebourba Way
10 Sainsburys, Shirley DC
11 Co-op, Shirley DC
12 Tesco Express, Shirley DC
13 Waitrose, Portswood DC
14 Co-op, Portswood DC
15 Asda, Southampton CC
16 M&S Food, Southampton CC
17 Tesco Express, Southampton CC
18 Lidl, Southampton CC
19 Co-op, Southampton CC

Eastleigh Stores

20 Asda, Bournemouth Rd
21 Co-op, Fryern Centre, Chandlers Ford
22 Waitrose, Fryern Centre, Chandlers Ford
23 Sainsburys, Eastleigh TC
24 Tesco, Eastleigh TC
25 Sainsburys, Tollbar Way
26 M&S Foodhall, Tollbar Way
27 Tesco, Bursledon

Wider Area Stores

28 Asda, Totton
29 Morrisons, Totton
30 Tesco Extra, Bourne Centre, Salisbury
31 Sainsburys, Badger Farm, Winchester
32 Sainsburys, Middle Brook St, Winchester
33 Tesco, Easton Lane, Winnall, Winchester

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