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Planning. Design. Economics.

Retail Update 2012

Test Valley Borough Council

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1.0 **Introduction**

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Test Valley Borough Council to prepare a borough wide retail capacity study in 2007. In 2008 NLP was commissioned assess retail development potential within Romsey.
- 1.2 Due to recent changes in population and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned to undertake an update of these previous studies.
- 1.3 This 2012 report provides a further update, identifying recent changes and trends in retail planning, including the National Planning Policy Framework (NPPF) and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels.
- 1.4 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Sections 3 sets out the updated retail capacity and quantitative need assessment. Section 4 reassesses the scope for accommodating growth. Section 5 provides the recommendations and conclusions.

2.0

Recent Changes and Trends

The National Planning Policy Framework

2.1

The 2007 study was based on the guidance set out in PPS6. This guidance was superseded by PPS4 in 2009 and now the NPPF published by the Department for Communities and Local Government on 27 March 2012.

2.2

At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

- Local planning authorities should positively seek opportunities to meet development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted.

2.3

All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15). Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).

2.4

In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
- the role and function of town centres and the relationship between them, including any trends in the performance of centres.
- the capacity of existing centres to accommodate new development.

2.5

In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;

- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.6 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.7 In terms of the sequential test, the policy requirements are largely unchanged from PPS6 and PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.8 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is

not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.9 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

The Economic Downturn

2.10 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.11 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

2.12 A revised assessment of retail capacity in Test Valley is set out in Section 3.0 of this report. This section provides an overview of national trends within the retail sector.

Expenditure Growth

2.13 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

- 2.14 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990's. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Test Valley.

New Forms of Retailing

- 2.15 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Test Valley. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Test Valley.

- 2.16 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 9 (Sept 2011)). Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:

"Growth in internet shopping has exceeded our expectations. Online spending increased in real terms by 18% in 2010 in line with the forecast in Retail Planner 8 of August 2010. However, 2011 has seen expansion continue at this impressive pace, despite the squeeze on consumers, rather than easing as in our previous forecast. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales in the next few years, but we now expect that market share holds constant from 2018 (rather than 2016). Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point."

- 2.17 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. 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 and Lidl was rapid during the last decade.
- 2.18 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

- 2.19 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 now fewer DIY operators and B&Q and Homebase have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.
- 2.20 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.
- 2.21 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the Borough. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.
- 2.22 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in Test Valley with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.
- 2.23 Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Winchester, Southampton, Basingstoke and Salisbury. Demand from multiples within the Romsey and to a lesser extent Andover is likely to be weaker, which will affect the appropriate strategies for individual centres.

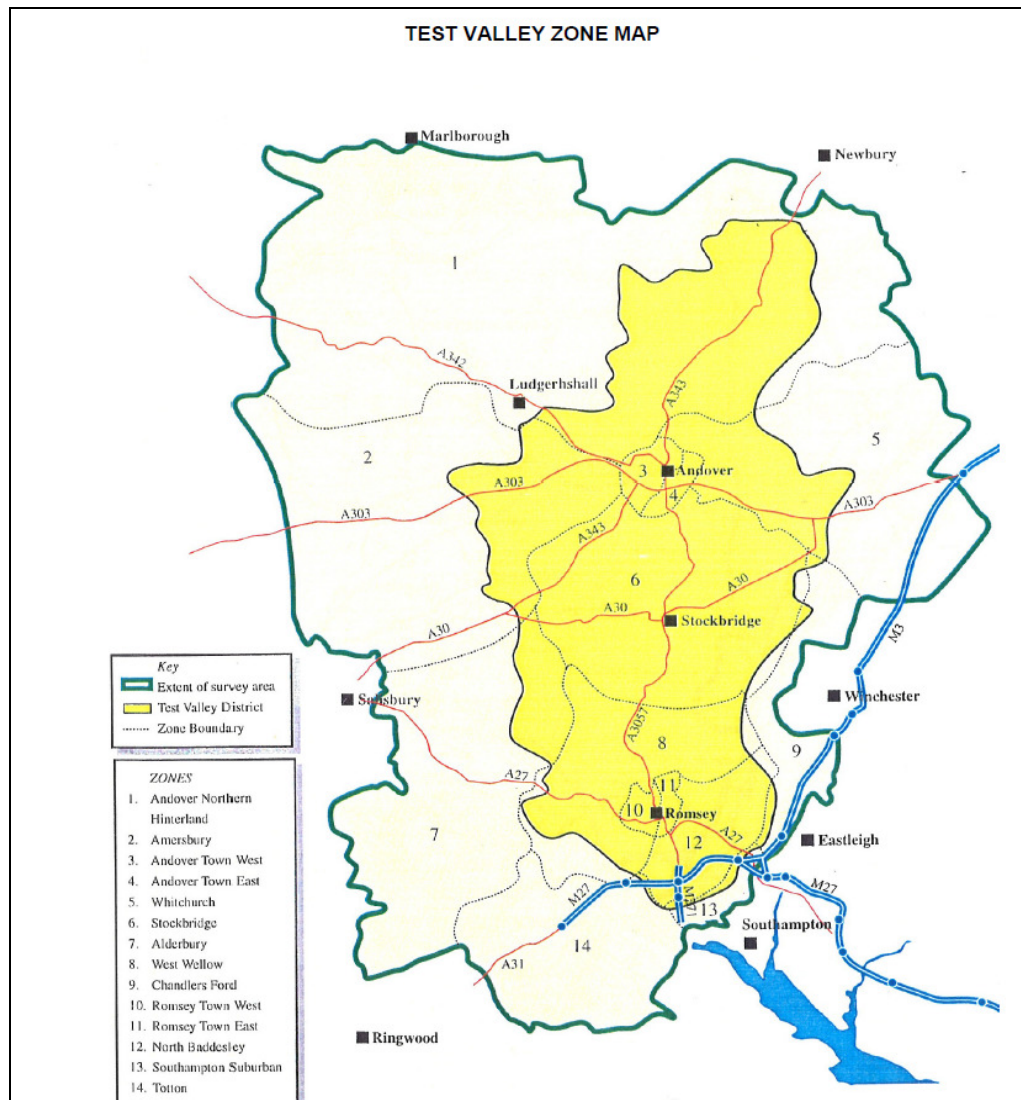
3.0 Quantitative Scope for Retail Floorspace

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Test Valley up to 2031. 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. All monetary vales expressed in 2010 prices unless stated otherwise. The 2007 NLP study was based on 2005 prices, therefore the expenditure and turnover figures are not directly comparable with the figures in the 2007 study. The 2007 study update provided projections from 2006 to 2026. The projections have been rolled forward and figures are provided from 2012 to 2016, 2021, 2026 and 2031.

Methodology and Data

3.2 The analysis adopts the study area from previous studies, as shown below.



- 3.3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area zones have been obtained.
- 3.4 Experian's EBS national expenditure information has been used to forecast expenditure within the study area. Experian's forecasts 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 consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities. Experian's forecast growth rates are 0.55% for convenience goods and 3% for comparison goods.
- 3.5 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates is based on previous retail studies, Southampton and Eastleigh household shopper survey results (January 2011) and adjustments to reflect changes since 2007.
- 3.6 The total turnover of identified shops within Test Valley is estimated based on penetration rates. The turnover estimate for retail floorspace is then compared to average benchmark or average sales floorspace densities derived from Verdict Information 2011 and Mintel's Retail Rankings, which provides an indication of how food stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail floorspace.

Population and Spending

- 3.7 The study area population for 2012 to 2031 is set out in Table 1 in Appendix A, based on the Experian population figures for 2010, projected forward using NLP's HEaDROOM population projections for Test Valley Borough and ONS and Hampshire County Council projections for other parts of the study area.
- 3.8 Table 2 in Appendix A sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031, based on an average annual growth rate of 0.55%. Comparison forecasts of per capita spending are shown in Table 2 in Appendix B, based on an average annual growth rate of 3%.
- 3.9 The level of available spending is derived by combining the population in Table 1 and per capita spending figures in Table 2. For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.10 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of

Trading” includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.

- 3.11 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3.7% and 8.8% of total convenience and comparison goods expenditure respectively in 2010. The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.
- 3.12 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 16.9% from £663.63 million in 2012 to £796.08 million in 2031, as shown in Table 3 in Appendix A.
- 3.13 Comparison goods spending is forecast to increase by 88% between 2012 and 2031, increasing from £1,015.84 million to £1,910 million, as shown in Table 3 in Appendix B. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

- 3.14 Existing convenience goods retail sales floorspace within the Test Valley is 18,807 sq m net as set out in Table 10 in Appendix A. Most of this floorspace is concentrated in Andover. This floorspace figure excludes comparison sales floorspace within food stores (2,974 sq m net).
- 3.15 Comparison goods retail sales floorspace within the Test Valley, including retail warehouses is estimated as 49,258 sq m net as shown in Table 10 in Appendix B, which includes comparison sales within food stores.

Existing Spending Patterns 2012

Convenience Shopping

- 3.16 The estimates of Test Valley’s market share or penetration within each study area zone are shown in Table 4 in Appendix A.
- 3.17 Table 5 indicates that the level of convenience goods expenditure attracted to shops/stores in the Test Valley Borough in 2012 is estimated to be £212.46 million. Test Valley’s market share of total convenience expenditure in the

study area as a whole is estimated to be about 32% (£212.46 million out of £663.63 million), i.e. the sum of Zones 1 to 14 in Table 5.

- 3.18 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 10 in Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 3.19 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 10 in Appendix A, for consistency with the use of goods based expenditure figures.
- 3.20 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £5,000 per sq m has been adopted for small convenience shops in Andover and Romsey. The total benchmark turnover of existing convenience sales floorspace within Test Valley is £196.55 million.
- 3.21 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Test Valley (excluding local shops) in 2012 is £205.61 million. These figures suggest that collectively convenience retail facilities in Test Valley are trading 4.6% above average levels. Facilities within Romsey are trading about 33% above average, and facilities in Andover are trading 1.7% below average.

Comparison Shopping

- 3.22 The estimates of Test Valley's comparison goods market share or penetration within each study area zone are shown in Table 4 in Appendix B.
- 3.23 Table 5 indicates that the level of comparison goods expenditure attracted to shops/stores in the Test Valley Borough in 2012 is estimated to be £214.89 million. Test Valley's market share of total comparison goods expenditure generated within the study area is about 21%, i.e. the sum of Zones 1 to 14 in Table 5 (£214.89 million out of the total of £1,015.84 million). Therefore 79% of comparison expenditure is spent elsewhere, in particular Southampton, Eastleigh, Winchester, and Salisbury etc.
- 3.24 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly. An average turnover density of £5,250 per sq m net is adopted for town centre floorspace, and £2,750 per sq m net is adopted for retail warehouses, consistent with information from Mintel's Retail Rankings.

- 3.25 The current level of comparison expenditure attracted to facilities in Test Valley is £214.895 million. Comparison floorspace within Andover is estimated to be trading slightly above (4.9%) benchmark. Romsey is estimated to be trading 12% above the benchmark turnover. However retail warehouses at Nursling Estate Retail Park are trading 13% below benchmark. On balance comparison shopping facilities within the Test Valley appear to be trading satisfactorily.

Quantitative Capacity for Convenience Floorspace

- 3.26 The level of available convenience goods expenditure in 2016, 2021, 2026 and 2031 is shown at Tables 6 to 9 in Appendix A.
- 3.27 The total level of available convenience goods expenditure available for shops in Test Valley between 2012 and 2031 is summarised in Table 11. This table takes into account the population and expenditure projections shown in Table 1 and 2 in Appendix A. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.28 Table 11 assumes that the benchmark turnover of convenience floorspace will not increase during 2012 to 2031 due to the recession. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing - September 2011). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.
- 3.29 The estimates of surplus/deficit expenditure are converted into floorspace projections in Table 11, Appendix A. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. Table 11 assumes different benchmark turnover densities for Andover/Romsey and Stockbridge/rural areas based on the existing benchmark sales densities shown in Table 10. The projections assume that a mix of different types of floorspace would be provided i.e. large food superstores, smaller supermarkets and small shops.
- 3.30 In the Borough as a whole there is currently a surplus of convenience expenditure (£9.07 million). This convenience expenditure surplus will increase to £16.17 million in 2016, and to £55.07 million in 2031.
- 3.31 The short term (up to 2016) surplus convenience expenditure is concentrated within Romsey, as a result of higher than average existing trading levels. The Romsey floorspace projection is 1,105 sq m net at 2016 increasing to 1,295 sq m net in 2021. Within Andover longer term expenditure growth could support 2,627 sq m net of convenience floorspace by 2031.
- 3.32 These floorspace projections assume an average sales density appropriate for main food store operators (£12,000 per sq m net). The floorspace projections

will be higher if smaller food store operators including discounters are assumed, because they have much lower average sales densities.

3.33 These floorspace projections are based on constant market shares. If the floorspace projections shown in Table 11 are not provided then it is likely the market share of facilities within the Borough will fall and therefore expenditure leakage will increase in the future.

3.34 Romsey has a lower market share of convenience expenditure within its local catchment than Andover (57% compared with over 95% in the urban area). If the large food store provision in Romsey can be improved then this is potential to increase this market share. As an example, we have assumed Romsey can increase its market share of convenience goods expenditure, as follows;

- Romsey urban area (zone 10/11) - 57% to 80%;
- West Wellow (zone 8) - 33% to 40%;
- North Baddesley (zone 12) - 10% to 15%.

3.35 The revised market shares for Romsey are shown in Table 12 in Appendix A and revised floorspace projections are shown in Table 13.

3.36 The impact implications of Romsey increasing its market share would need to be carefully considered if a food store proposal came forward, which significantly exceeds the constant market share floorspace projections shown in Table 11. Nevertheless, the figures indicate there is potential for new food store development to increase Romsey's existing market shares, and in this respect the constant market share floorspace projections in Table 11 should be viewed as minimum estimates.

Quantitative Capacity for Comparison Floorspace

3.37 The assessment of existing shopping patterns in 2012 indicates that there is a high level of comparison expenditure leakage from Test Valley Borough (about 60%). One would expect comparison expenditure outflow to continue to large centres including Southampton.

3.38 Further improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from parts of the study area. Conversely developments within surrounding centres may reduce Test Valley's market share. We have projected the level of comparison goods expenditure available to shops in Test Valley at 2016, 2021, 2026 and 2031 based on constant market shares, as shown in Tables 5 to 9 in Appendix B. Constant market shares are considered to be appropriate for long term floorspace projections. The level of comparison expenditure attracted to facilities in Test Valley is expected to increase from £214.89 million in 2012 to £408.96 million in 2031.

3.39 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the Borough in order to provide estimates of surplus expenditure, as shown in Table 11. Table 11 assumes

that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

- 3.40 The growth in comparison goods expenditure available for shops in Test Valley between 2012 and 2031 is summarised in Table 11, in Appendix B. In the short term up to 2016, in the Borough as a whole there is a surplus in available comparison expenditure of £20.86 million. By 2021 population and expenditure growth will result in a comparison expenditure surplus of £46.45 million increasing to £125.43 million in 2031. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 11 in Appendix B.
- 3.41 Surplus expenditure at 2021 could support 7,602 sq m net of comparison sales floorspace, increasing to 17,344 sq m net by 2031.

4.0

Scope for Accommodating Growth

Floorspace Projections

4.1

The floorspace projections set out in the previous sections assume that new shopping facilities within Test Valley can help to maintain the Borough's current market share of expenditure within the study area. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- 1 major retail developments in competing centres, such as Southampton, Winchester, Salisbury and Eastleigh;
- 2 the re-occupation of vacant town centre floorspace;
 - a the availability of land to accommodate new development;
- 3 the reliability of long term expenditure projections, particularly after 2021;
- 4 the effect of Internet/home shopping on the demand for retail property;
- 5 the level of operator demand for floorspace in Test Valley, bearing in mind the proximity of larger centres (e.g. Southampton);
- 6 the likelihood that Test Valley's existing market share of expenditure will change in the future; and
- 7 the potential impact new development may have on existing centres.

4.2

The long term comparison goods floorspace projections (i.e. 2026 and 2031) shown in Table 11 in Appendix B should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. Long term projections should be monitored and kept under-review.

4.3

The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Therefore, internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

Accommodating Future Growth

- 4.4 The sequential approach suggests that designated town centres should be the first choice for retail development. All development should be appropriate in terms of scale and nature to the centre in which it is located. Based on the hierarchy of centres and the retail floorspace projections in this study report, retail developments over 500 sq m gross should generally be accommodated in Andover or Romsey.
- 4.5 The NPPF indicates that impact assessments should normally only be necessary for developments outside town centres of over 2,500 sq m gross. This threshold is considered inappropriate within Test Valley because this scale of development would represent a significant proportion of the overall retail floorspace projections in the Borough. Development smaller than 2,500 sq m gross could have a significant adverse impact. Based on the retail floorspace projections and the network of centres, a threshold of 1,000 sq m gross is recommended for retail development within Andover and Romsey, and a 500 sq m gross threshold for other parts of the Borough.
- 4.6 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 comparison retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 1.7% per annum is assumed for comparison floorspace and this 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.
- 4.7 Goad Plans indicate there were 33 vacant shop units (totalling 5,400 sq m gross) within Andover and Romsey town centres in September 2011. The vacancy rate in Andover is about 8.4% which is below the Goad national average (13.7%). The vacancy rate in Romsey is only 5.1%. These vacant premises could help to accommodate growth, e.g. if the current vacancy rate in Andover fell from 8.4% to 5% (i.e. the reoccupation of 10 vacant properties) could accommodate up to 1,600 sq m gross of retail space (160 sq m a unit).

Potential Development Opportunities in Romsey

- 4.8 NLP's assessment of retail development potential in Romsey in 2008 evaluated 14 sites within the town. NLP has been asked to reassess the development potential of six sites at the southern end of Romsey town centre, as follows:
- 1 Romsey Bus Station and Broadwater Road car park (approx 0.6ha);
 - 2 Rear service yards of the Hundred (0.05ha);
 - 3 Aldi car park (0.4ha);
 - 4 Crosfield Hall and car park (0.4ha);
 - 5 Edwina Mountbatten House (0.3ha).
 - 6 Broadwater Road/Banning Street Residential area (1.9ha).

Food Store Development

- 4.9 The short to medium term (2016 and 2021) convenience goods floorspace projections for Romsey suggest a food store with a net sales area of 1,100 to 1,300 sq m net will be required, assuming a store of this size is operated by a main food store retailer e.g. Asda, Morrison's, M & S Simply Food, Sainsbury's or Tesco. This is the minimum size store likely to be suitable for main and bulk food shopping. In our view a store of this size would not significantly increase Romsey's market share and would not significantly reduce expenditure leakage from the town.
- 4.10 A store of this size would have a total floorspace of between 1,600 to 1,800 sq m gross and would ideally need 150 plus car parking spaces. A store of this size with decked parking would need a regular shaped site with an area of at least 0.4 to 0.5 hectares.
- 4.11 Four of the six sites listed above are theoretically large enough to accommodate a food store of 1,600 sq m gross with decked parking, but all have constraints, as follows:
- 1 **Romsey Bus Station and Broadwater Road car park:** an alternative site for the bus station and car park would need to be found within or close to the town centre. The cost of relocating the bus station and the need for decked car parking is likely to be prohibitive. Given the relocation costs, the need for decked parking and the proximity of the larger Waitrose store (about 2,000 sq m net) this opportunity is unlikely to be attractive or viable for a major food store operator.
 - 2 **Aldi car park:** Aldi is unlikely to sell their car park, particularly for a new food store to be occupied by a competitor. The loss of the car park would make the Aldi store unviable. Whilst occupied by Aldi the site is unavailable for development. An alternative site for displaced car parking would need to be found if the site was developed. Given the likely acquisition costs (assuming Aldi is prepared to sell), the need for decked parking and the proximity of the larger Waitrose store, this opportunity is unlikely to be attractive or viable for a major food store operator.
 - 3 **Crosfield Hall and car park:** an alternative site for the displaced hall would need to be found. A high density food store development with decked parking and replacement hall on the upper floor would be required. The cost of acquisition, demolition and relocating the hall is likely to be prohibitive. Given these costs, the need for decked parking and the proximity of the larger Waitrose store, this opportunity is unlikely to be attractive or viable for a major food store operator.
 - 4 **Edwina Mountbatten House:** this site is too small to accommodate a viable food store of the minimum size required. The cost of acquisition, demolition and relocating the care home is likely to be prohibitive.
 - 5 **Broadwater Road/Banning Street Residential area:** this site is large enough to accommodate a large food store with surface car parking that would be in a location and size terms commercially attractive to food

store operators. However the site is in multiple ownerships and land assembly is likely to require CPO. The cost of acquisition, demolition and relocating existing residents is likely to be prohibitive.

- 6 **Crosfield Hall and car park, Edwina Mountbatten House and Broadwater Road/Banning Street Residential area:** an amalgamation of sites 3, 4 and 5. Again this composite site can accommodate a large food store with surface car parking that would be in a location and size terms commercially attractive to food store operators, but the cost of acquisition, demolition and relocating existing residents is likely to be prohibitive. There is a high degree of uncertainty over delivery of this larger site and it is unlikely be viable.

4.12 In our view none of the food store opportunities are available and viable.

Comparison Goods Development

4.13 The short to medium term (2016 and 2021) comparison floorspace projections for Romsey suggest about 2,800 sq m gross could be accommodated by 2021. As indicated above, vacant shop units in Romsey are unlikely to accommodate a significant proportion of this new floorspace. Small scale infill development and intensification with the town centre could help to meet some of the projection.

4.14 For the reasons outlined above, most of the six site opportunities are unlikely to be available or viable to accommodate new comparison floorspace.

4.15 Site 2 the rear service yards of the Hundred could accommodate a very small increase in retail floorspace (not more than 200 sq m).

4.16 Subject to the acceptable loss of car parking spaces at Broadwater Road car park, Stirling Walks could be extended onto Broadwater Road car park to provide 8-10 small retail units (up to about 1,000 sq m gross). Or up to 2,000 sq m gross could be accommodate in two parades on the car parks either side of the existing service road. Replacement car parking may need to be identified elsewhere.

5.0

Conclusions and Recommendations

Meeting Shopping Needs in Test Valley

5.1

This report provides an update of the Borough wide capacity assessment for retail development in Test Valley should be read alongside the 2007 Study.

5.2

The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

5.3

Long term forecasts up to 2026 and 2031 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2021 is attributable to projected growth in spending per capita, extrapolated from past growth projections, as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should also be monitored along with the affect proposals may have on the demand for additional development in Test Valley.

Retail Floorspace Projections

5.4

The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within the Test Valley. The baseline floorspace projections assume test valley will maintain it current market share of expenditure. New development will be required to maintain existing market shares. The projections suggest new floorspace should be distributed as follows:

Table 5.1 Class A1 Retail Floorspace Projections

Location	Floorspace sq.m. net (sq. ft net)		
	Convenience	Comparison	Total
Up to 2021			
Andover	885	5,433	6,318
Romsey	1,295	2,143	3,438
Rest of Borough	152	26	178
Total	2,333	7,602	9,935
Up to 2031			
Andover	2,627	12,184	14,811
Romsey	1,803	4,184	5,987
Rest of Borough	382	975	1,357
Total	4,812	17,344	22,156

Source: Appendix A and B - Tables 11

* based on constant shares

- 5.5 Within Romsey the retention of convenience goods expenditure is relatively low and there is potential to increase market share if food store provision is improved. On the basis of constant market shares, currently Romsey could support a food store of around 1,000 sq m net, increasing to 1,100 to 1,300 sq m net in the short to medium term (2016 to 2021). In our view a food store of this size will not reduce expenditure leakage from Romsey and is unlikely to be commercially attractive to food store operators, who will need to compete with the larger Waitrose store. Subject to demonstrating acceptable impact on Romsey town centre we believe the convenience floorspace projections could be exceeded in Romsey.

Changes Since 2007

- 5.6 The updated convenience retail floorspace projections are marginally higher in the period up to 2026 than the projections within the 2007 study. The comparison floorspace projections are lower. The differences are due to a number of factors including:

Convenience

- a slight increase in population projections within the study area; and
- a reduction in the average sales densities of food store retailers.

Comparison

- a decrease in the comparison retail expenditure per capita for the study area; and
- lower forecast annual expenditure growth rates.

Accommodating Future Growth

- 5.7 The NPPF sequential approach still suggests that designated town centres should be the first choice for retail development. Based on the hierarchy of centres and the retail floorspace projections in this study report, retail developments over 500 sq m gross should generally be accommodated in Andover or Romsey.
- 5.8 Based on the retail floorspace projections and the network of centres, a threshold for impact assessments of 1,000 sq m gross is recommended for retail development outside defined centres within Andover and Romsey, and a 500 sq m gross threshold for other parts of the Borough.
- 5.9 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 comparison retail floorspace can, on average, increase its turnover to sales floorspace densities (a growth rate of 1.7% per annum is assumed for comparison goods). The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.10

The proportion of vacant shops in Test Valley is relatively low when compared with the Goad national average. Vacant premises are unlikely to accommodate a significant amount of growth, because all centres will have a certain level of vacant premises at any given time, and this reflects the normal churn of occupiers.

Appendix A Convenience Assessment

Table 1: Population Projections

Zone Area	2010	2012	2016	2021	2026	2031
Zone 1: Andover - N Hinterland	39,008	39,356	40,330	41,328	42,493	43,527
Zone 2: Amesbury	42,596	43,015	44,105	45,278	46,686	47,927
Zone 3: Andover - West	19,835	19,997	20,568	21,114	21,905	22,641
Zone 4: Andover - East	20,022	20,186	20,762	21,313	22,111	22,855
Zone 5: Whitchurch	19,958	20,262	20,817	21,204	21,816	22,418
Zone 6: Stockbridge	13,054	13,161	13,537	13,896	14,416	14,901
Zone 7: Alderbury	18,921	18,921	19,224	19,674	20,268	20,819
Zone 8: West Wellow	8,803	8,875	9,128	9,371	9,722	10,048
Zone 9: Chandlers Ford	38,878	40,244	41,469	42,035	42,995	43,977
Zone 10 and 11: Romsey	18,114	18,262	18,784	19,282	20,004	20,677
Zone 12: North Baddesley	23,294	23,485	24,155	24,796	25,725	26,590
Zone 13: Southampton Suburbs	40,512	40,678	41,259	41,807	42,591	43,307
Zone 14: Totton	39,365	38,592	38,492	39,144	40,256	41,400
Total	342,360	345,034	352,629	360,239	370,989	381,088

Sources:

Experian 2010 Base Year Population
NLP HEaDROOM population projections for Test Valley
Hampshire County Council projections up to 2018
ONS projections beyond 2018 and Wiltshire/West Berkshire parts of study area

Table 2: Convenience Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Andover - N Hinterland	£2,064	£2,077	£2,127	£2,180	£2,241	0.6%	3.1%	5.6%	7.9%
Zone 2: Amesbury	£1,792	£1,804	£1,847	£1,893	£1,946	0.7%	3.1%	5.6%	7.9%
Zone 3: Andover - West	£1,898	£1,909	£1,955	£2,004	£2,060	0.6%	3.0%	5.6%	7.9%
Zone 4: Andover - East	£1,873	£1,885	£1,930	£1,978	£2,033	0.6%	3.0%	5.6%	7.9%
Zone 5: Whitchurch	£1,989	£2,002	£2,050	£2,101	£2,160	0.7%	3.1%	5.6%	7.9%
Zone 6: Stockbridge	£2,139	£2,152	£2,204	£2,259	£2,322	0.6%	3.0%	5.6%	7.9%
Zone 7: Alderbury	£2,176	£2,190	£2,242	£2,298	£2,362	0.6%	3.0%	5.6%	7.9%
Zone 8: West Wellow	£2,196	£2,210	£2,263	£2,319	£2,384	0.6%	3.1%	5.6%	7.9%
Zone 9: Chandlers Ford	£1,926	£1,938	£1,984	£2,034	£2,091	0.6%	3.0%	5.6%	7.9%
Zone 10 and 11: Romsey	£1,866	£1,878	£1,923	£1,971	£2,026	0.6%	3.1%	5.6%	7.9%
Zone 12: North Baddesley	£1,854	£1,866	£1,910	£1,958	£2,013	0.6%	3.0%	5.6%	7.9%
Zone 13: Southampton Suburbs	£1,745	£1,756	£1,798	£1,843	£1,895	0.6%	3.0%	5.6%	7.9%
Zone 14: Totton	£1,926	£1,938	£1,984	£2,034	£2,091	0.6%	3.0%	5.6%	7.9%

Sources:

Experian local estimates for 2010 convenience goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates

Table 3: Total Available Convenience Goods Expenditure (£M - 2010 Prices)

Zone	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Andover - N Hinterland	£81.23	£83.76	£87.90	£92.64	£97.54	3.1%	8.2%	14.0%	20.1%
Zone 2: Amesbury	£77.08	£79.56	£83.63	£88.38	£93.27	3.2%	8.5%	14.7%	21.0%
Zone 3: Andover - West	£37.95	£39.26	£41.28	£43.90	£46.64	3.5%	8.8%	15.7%	22.9%
Zone 4: Andover - East	£37.81	£39.14	£41.13	£43.74	£46.46	3.5%	8.8%	15.7%	22.9%
Zone 5: Whitchurch	£40.30	£41.68	£43.47	£45.84	£48.42	3.4%	7.9%	13.7%	20.2%
Zone 6: Stockbridge	£28.15	£29.13	£30.63	£32.57	£34.60	3.5%	8.8%	15.7%	22.9%
Zone 7: Alderbury	£41.17	£42.10	£44.11	£46.58	£49.18	2.3%	7.1%	13.1%	19.4%
Zone 8: West Wellow	£19.49	£20.17	£21.21	£22.54	£23.96	3.5%	8.8%	15.7%	22.9%
Zone 9: Chandlers Ford	£77.51	£80.37	£83.40	£87.45	£91.96	3.7%	7.6%	12.8%	18.6%
Zone 10 and 11: Romsey	£34.08	£35.28	£37.08	£39.43	£41.89	3.5%	8.8%	15.7%	22.9%
Zone 12: North Baddesley	£43.54	£45.07	£47.36	£50.37	£53.53	3.5%	8.8%	15.7%	22.9%
Zone 13: Southampton Suburbs	£70.98	£72.45	£75.17	£78.49	£82.07	2.1%	5.9%	10.6%	15.6%
Zone 14: Totton	£74.33	£74.60	£77.66	£81.88	£86.57	0.4%	4.5%	10.2%	16.5%
Total	£663.63	£682.57	£714.02	£753.79	£796.08	2.9%	7.6%	13.6%	20.0%

Sources:

Table 1 and Table 2

Table 4: Convenience Shopping Penetration Rates 2012

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	19%	28%	94%	92%	57%	78%	0%	3%	5%	0%	0%	0%	0%
Romsey	0%	0%	0%	0%	0%	3%	5%	33%	6%	57%	10%	11%	2%
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%	59%	11%	11%	2%
Other Outside District	80%	70%	5%	4%	42%	12%	94%	62%	89%	41%	89%	89%	98%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: NLP adjusted market shares
NEMS household survey January 2011 (Zone 10/11)

Table 5: Convenience Expenditure 2012 £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 2012	£81.23	£77.08	£37.95	£37.81	£40.30	£28.15	£41.17	£19.49	£77.51	£34.08	£43.54	£70.98	£74.33	£663.63
Andover	£15.43	£21.58	£35.68	£34.78	£22.97	£21.96	£0.00	£0.58	£3.88	£0.00	£0.00	£0.00	£0.00	£156.87
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.84	£2.06	£6.43	£4.65	£19.42	£4.35	£7.81	£1.49	£47.06
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69
Local Centres/Shops	£0.81	£1.54	£0.38	£1.51	£0.40	£0.28	£0.41	£0.39	£0.00	£0.68	£0.44	£0.00	£0.00	£6.85
District Total	£16.25	£23.12	£36.06	£36.30	£23.37	£24.77	£2.47	£7.41	£8.53	£20.11	£4.79	£7.81	£1.49	£212.46
Other Outside District	£64.98	£53.96	£1.90	£1.51	£16.93	£3.38	£38.70	£12.08	£68.98	£13.97	£38.75	£63.18	£72.84	£451.17
Total	£81.23	£77.08	£37.95	£37.81	£40.30	£28.15	£41.17	£19.49	£77.51	£34.08	£43.54	£70.98	£74.33	£663.63

Sources: Table 3 and Table 4

Table 6: 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	£83.76	£79.56	£39.26	£39.14	£41.68	£29.13	£42.10	£20.17	£80.37	£35.28	£45.07	£72.45	£74.60	£682.57
Andover	£15.92	£22.28	£36.91	£36.01	£23.75	£22.72	£0.00	£0.61	£4.02	£0.00	£0.00	£0.00	£0.00	£162.21
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.87	£2.11	£6.66	£4.82	£20.11	£4.51	£7.97	£1.49	£48.53
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.75	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.75
Local Centres/Shops	£0.84	£1.59	£0.39	£1.57	£0.42	£0.29	£0.42	£0.40	£0.00	£0.71	£0.45	£0.00	£0.00	£7.08
District Total	£16.75	£23.87	£37.30	£37.57	£24.17	£25.63	£2.53	£7.67	£8.84	£20.81	£4.96	£7.97	£1.49	£219.57
Other Outside District	£67.01	£55.70	£1.96	£1.57	£17.50	£3.50	£39.58	£12.51	£71.53	£14.46	£40.12	£64.48	£73.10	£463.01
Total	£83.76	£79.56	£39.26	£39.14	£41.68	£29.13	£42.10	£20.17	£80.37	£35.28	£45.07	£72.45	£74.60	£682.57

Sources: Table 3 and Table 4

Table 7: 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	£87.90	£83.63	£41.28	£41.13	£43.47	£30.63	£44.11	£21.21	£83.40	£37.08	£47.36	£75.17	£77.66	£714.02
Andover	£16.70	£23.42	£38.80	£37.84	£24.78	£23.89	£0.00	£0.64	£4.17	£0.00	£0.00	£0.00	£0.00	£170.23
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.92	£2.21	£7.00	£5.00	£21.13	£4.74	£8.27	£1.55	£50.82
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.84
Local Centres/Shops	£0.88	£1.67	£0.41	£1.65	£0.43	£0.31	£0.44	£0.42	£0.00	£0.74	£0.47	£0.00	£0.00	£7.43
District Total	£17.58	£25.09	£39.21	£39.49	£25.21	£26.95	£2.65	£8.06	£9.17	£21.88	£5.21	£8.27	£1.55	£230.32
Other Outside District	£70.32	£58.54	£2.06	£1.65	£18.26	£3.68	£41.46	£13.15	£74.22	£15.20	£42.15	£66.90	£76.11	£483.70
Total	£87.90	£83.63	£41.28	£41.13	£43.47	£30.63	£44.11	£21.21	£83.40	£37.08	£47.36	£75.17	£77.66	£714.02

Sources: Table 3 and Table 4

Table 8: 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	£92.64	£88.38	£43.90	£43.74	£45.84	£32.57	£46.58	£22.54	£87.45	£39.43	£50.37	£78.49	£81.88	£753.79
Andover	£17.60	£24.75	£41.26	£40.24	£26.13	£25.40	£0.00	£0.68	£4.37	£0.00	£0.00	£0.00	£0.00	£180.42
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.98	£2.33	£7.44	£5.25	£22.47	£5.04	£8.63	£1.64	£53.78
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
Local Centres/Shops	£0.93	£1.77	£0.44	£1.75	£0.46	£0.33	£0.47	£0.45	£0.00	£0.79	£0.50	£0.00	£0.00	£7.88
District Total	£18.53	£26.51	£41.70	£41.99	£26.58	£28.66	£2.79	£8.57	£9.62	£23.26	£5.54	£8.63	£1.64	£244.03
Other Outside District	£74.11	£61.86	£2.19	£1.75	£19.25	£3.91	£43.78	£13.98	£77.83	£16.17	£44.83	£69.86	£80.24	£509.77
Total	£92.64	£88.38	£43.90	£43.74	£45.84	£32.57	£46.58	£22.54	£87.45	£39.43	£50.37	£78.49	£81.88	£753.79

Sources: Table 3 and Table 4

Table 9: Convenience Expenditure 2031 £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 2031	£97.54	£93.27	£46.64	£46.46	£48.42	£34.60	£49.18	£23.96	£91.96	£41.89	£53.53	£82.07	£86.57	£796.08
Andover	£18.53	£26.11	£43.84	£42.75	£27.60	£26.99	£0.00	£0.72	£4.60	£0.00	£0.00	£0.00	£0.00	£191.14
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£2.46	£7.91	£5.52	£23.88	£5.35	£9.03	£1.73	£56.91
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.08
Local Centres/Shops	£0.98	£1.87	£0.47	£1.86	£0.48	£0.35	£0.49	£0.48	£0.00	£0.84	£0.54	£0.00	£0.00	£8.34
District Total	£19.51	£27.98	£44.31	£44.61	£28.09	£30.45	£2.95	£9.10	£10.12	£24.72	£5.89	£9.03	£1.73	£258.47
Other Outside District	£78.04	£65.29	£2.33	£1.86	£20.34	£4.15	£46.22	£14.85	£81.84	£17.18	£47.64	£73.04	£84.84	£537.61
Total	£97.54	£93.27	£46.64	£46.46	£48.42	£34.60	£49.18	£23.96	£91.96	£41.89	£53.53	£82.07	£86.57	£796.08

Sources: Table 3 and Table 4

Table 10: Convenience Floorspace and Expected Turnover (2010 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					
Asda, Anton Mill Road, Andover	4,181	67%	2,801	£14,187	£39.74
Iceland, Andover	621	95%	590	£6,697	£3.95
Marks & Spencer Food Court, Andover	300	100%	300	£10,826	£3.25
Sainsburys, Bridge Street, Andover	1,467	90%	1,320	£12,599	£16.63
Sainsburys, Shepherds Spring Lane, Andover	2,092	85%	1,778	£12,599	£22.40
Tesco, River Way, Andover	2,970	85%	2,525	£12,432	£31.38
Waitrose, Andover	1,293	95%	1,228	£11,475	£14.10
Co-op, Charlton Road, Andover	150	98%	147	£7,279	£1.07
Co-op, London Road, Andover	150	98%	147	£7,279	£1.07
Co-op, Weyhill Road, Andover	129	98%	126	£7,279	£0.92
Tesco Metro, Chantry Way, Andover	1,180	90%	1,062	£12,432	£13.20
Tesco, Compton Square, Andover	130	98%	127	£12,432	£1.58
Tesco Express, Weyhill Road, Andover	213	98%	209	£12,432	£2.60
Tesco Express, Charlton Road, Andover	198	98%	194	£12,432	£2.41
Lidl, Andover	929	80%	743	£3,030	£2.25
Other town centre shops	610	100%	610	£5,000	£3.05
Total	16,613		13,908	£11,476	£159.61
Romsey					
Co-op, Saxon Way, Romsey	210	98%	206	£7,279	£1.50
Co-op, The Hundred, Romsey	250	98%	245	£7,279	£1.78
Waitrose, Romsey	1,932	95%	1,835	£11,475	£21.06
Aldi, Romsey	800	80%	640	£6,148	£3.93
Other Romsey shops	1,400	100%	1,400	£5,000	£7.00
Total	4,592		4,326	£8,154	£35.28
Other					
Co-op, Stockbridge	176	98%	172	£7,279	£1.26
Other Stockbridge shops	100	100%	100	£4,000	£0.40
Total	276		272	£6,076	£1.66
GRAND TOTAL	21,481		18,507	£10,620	£196.55
Comparison Sales Floorspace in Food Stores sq m net					2,974

Sources: IGD Food Store Directory, Verdict 2011 and Goad Plans

Table 11: Convenience Floorspace Capacity 2012 to 2031 (£Million)

Town	2012	2016	2021	2026	2031
Available Expenditure in District					
Andover	£156.87	£162.21	£170.23	£180.42	£191.14
Romsey	£47.06	£48.53	£50.82	£53.78	£56.91
Stockbridge	£1.69	£1.75	£1.84	£1.95	£2.08
Local Centres/Shops	£6.85	£7.08	£7.43	£7.88	£8.34
Total	£212.46	£219.57	£230.32	£244.03	£258.47
Benchmark Turnover of Existing Facilities					
Andover	£159.61	£159.61	£159.61	£159.61	£159.61
Romsey	£35.28	£35.28	£35.28	£35.28	£35.28
Stockbridge	£1.66	£1.66	£1.66	£1.66	£1.66
Local Centres/Shops	£6.85	£6.85	£6.85	£6.85	£6.85
Total	£203.40	£203.40	£203.40	£203.40	£203.40
Surplus Expenditure					
Andover	-£2.75	£2.59	£10.62	£20.81	£31.53
Romsey	£11.78	£13.26	£15.54	£18.50	£21.63
Stockbridge	£0.03	£0.09	£0.18	£0.30	£0.42
Local Centres/Shops	£0.00	£0.23	£0.58	£1.03	£1.49
Total	£9.07	£16.17	£26.92	£40.63	£55.07
Turnover Density for New Floorspace					
£ per sq m net					
Andover/Romsey	£12,000	£12,000	£12,000	£12,000	£12,000
Stockbridge/Local Shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace (sq m (net))					
Andover	-229	216	885	1,734	2,627
Romsey	982	1,105	1,295	1,542	1,803
Stockbridge	7	18	36	60	84
Local Centres/Shops	0	45	116	205	298
Total	760	1,385	2,333	3,541	4,812

Sources: Tables 1 to 10

Table 12: Increased Convenience Shopping Penetration Rates in Romsey

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	19%	28%	94%	92%	57%	78%	0%	3%	5%	0%	0%	0%	0%
Romsey	0%	0%	0%	0%	0%	3%	5%	40%	6%	80%	15%	11%	2%
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%	45%	11%	82%	16%	11%	2%
Other Outside District	80%	70%	5%	4%	42%	12%	94%	55%	89%	18%	84%	89%	98%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

**Table 13 Convenience Floorspace Capacity 2012 to 2031 (£Million)
(increased Romsey market shares)**

Town	2012	2016	2021	2026	2031
Available Expenditure in District					
Andover	£156.87	£162.21	£170.23	£180.42	£191.14
Romsey	£47.06	£60.31	£63.20	£66.94	£70.90
Stockbridge	£1.69	£1.75	£1.84	£1.95	£2.08
Local Centres/Shops	£6.85	£7.08	£7.43	£7.88	£8.34
Total	£212.46	£231.35	£242.70	£257.19	£272.46
Benchmark Turnover of Existing Facilities					
Andover	£159.61	£159.61	£159.61	£159.61	£159.61
Romsey	£35.28	£35.28	£35.28	£35.28	£35.28
Stockbridge	£1.66	£1.66	£1.66	£1.66	£1.66
Local Centres/Shops	£6.85	£6.85	£6.85	£6.85	£6.85
Total	£203.40	£203.40	£203.40	£203.40	£203.40
Surplus Expenditure					
Andover	-£2.75	£2.59	£10.62	£20.81	£31.53
Romsey	£11.78	£25.04	£27.92	£31.66	£35.62
Stockbridge	£0.03	£0.09	£0.18	£0.30	£0.42
Local Centres/Shops	£0.00	£0.23	£0.58	£1.03	£1.49
Total	£9.07	£27.95	£39.30	£53.80	£69.06
Turnover Density for New Floorspace					
£ per sq m net					
Andover/Romsey	£12,000	£12,000	£12,000	£12,000	£12,000
Stockbridge/Local Shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace (sq m (net))					
Andover	-229	216	885	1,734	2,627
Romsey	982	2,086	2,327	2,639	2,968
Stockbridge	7	18	36	60	84
Local Centres/Shops	0	45	116	205	298
Total	760	2,366	3,365	4,638	5,978

Appendix B Comparison Assessment

Table 1: Population Projections

Zone Area	2010	2012	2016	2021	2026	2031
Zone 1: Andover - N Hinterland	39,008	39,356	40,330	41,328	42,493	43,527
Zone 2: Amesbury	42,596	43,015	44,105	45,278	46,686	47,927
Zone 3: Andover - West	19,835	19,997	20,568	21,114	21,905	22,641
Zone 4: Andover - East	20,022	20,186	20,762	21,313	22,111	22,855
Zone 5: Whitchurch	19,958	20,262	20,817	21,204	21,816	22,418
Zone 6: Stockbridge	13,054	13,161	13,537	13,896	14,416	14,901
Zone 7: Alderbury	18,921	18,921	19,224	19,674	20,268	20,819
Zone 8: West Wellow	8,803	8,875	9,128	9,371	9,722	10,048
Zone 9: Chandlers Ford	38,878	40,244	41,469	42,035	42,995	43,977
Zone 10 and 11: Romsey	18,114	18,262	18,784	19,282	20,004	20,677
Zone 12: North Baddesley	23,294	23,485	24,155	24,796	25,725	26,590
Zone 13: Southampton Suburbs	40,512	40,678	41,259	41,807	42,591	43,307
Zone 14: Totton	39,365	38,592	38,492	39,144	40,256	41,400
Total	342,360	345,034	352,629	360,239	370,989	381,088

Sources:

Experian 2010 Base Year Population

NLP HEaDROOM population projections for Test Valley

Hampshire County Council projections up to 2018

ONS projections beyond 2018 and Wiltshire/West Berkshire parts of study area

Table 2: Comparison Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Andover - N Hinterland	£3,322	£3,631	£4,204	£4,874	£5,650	9.3%	26.6%	46.7%	55.6%
Zone 2: Amesbury	£2,877	£3,145	£3,641	£4,221	£4,894	9.3%	26.6%	46.7%	55.6%
Zone 3: Andover - West	£2,859	£3,126	£3,619	£4,196	£4,864	9.3%	26.6%	46.8%	55.6%
Zone 4: Andover - East	£2,681	£2,931	£3,394	£3,934	£4,561	9.3%	26.6%	46.7%	55.6%
Zone 5: Whitchurch	£3,077	£3,363	£3,895	£4,515	£5,234	9.3%	26.6%	46.7%	55.6%
Zone 6: Stockbridge	£3,454	£3,775	£4,371	£5,068	£5,875	9.3%	26.5%	46.7%	55.6%
Zone 7: Alderbury	£3,530	£3,859	£4,468	£5,180	£6,005	9.3%	26.6%	46.7%	55.6%
Zone 8: West Wellow	£3,624	£3,961	£4,587	£5,317	£6,164	9.3%	26.6%	46.7%	55.6%
Zone 9: Chandlers Ford	£3,055	£3,340	£3,867	£4,483	£5,197	9.3%	26.6%	46.7%	55.6%
Zone 10 and 11: Romsey	£2,723	£2,977	£3,447	£3,996	£4,632	9.3%	26.6%	46.7%	55.6%
Zone 12: North Baddesley	£2,728	£2,982	£3,452	£4,002	£4,640	9.3%	26.5%	46.7%	55.6%
Zone 13: Southampton Suburbs	£2,356	£2,576	£2,983	£3,458	£4,008	9.3%	26.6%	46.8%	55.6%
Zone 14: Totton	£2,869	£3,136	£3,631	£4,209	£4,880	9.3%	26.6%	46.7%	55.6%

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates

Table 3: Total Available Comparison Goods Expenditure (£M - 2010 Prices)

Zone	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Andover - N Hinterland	£130.74	£146.44	£173.74	£207.11	£245.93	12.0%	32.9%	58.4%	88.1%
Zone 2: Amesbury	£123.75	£138.71	£164.86	£197.06	£234.56	12.1%	33.2%	59.2%	89.5%
Zone 3: Andover - West	£57.17	£64.30	£76.41	£91.91	£110.13	12.5%	33.7%	60.8%	92.6%
Zone 4: Andover - East	£54.12	£60.85	£72.34	£86.99	£104.24	12.4%	33.7%	60.7%	92.6%
Zone 5: Whitchurch	£62.35	£70.01	£82.59	£98.50	£117.33	12.3%	32.5%	58.0%	88.2%
Zone 6: Stockbridge	£45.46	£51.10	£60.74	£73.06	£87.54	12.4%	33.6%	60.7%	92.6%
Zone 7: Alderbury	£66.79	£74.19	£87.90	£104.99	£125.02	11.1%	31.6%	57.2%	87.2%
Zone 8: West Wellow	£32.16	£36.16	£42.98	£51.69	£61.94	12.4%	33.6%	60.7%	92.6%
Zone 9: Chandlers Ford	£122.95	£138.51	£162.55	£192.75	£228.55	12.7%	32.2%	56.8%	85.9%
Zone 10 and 11: Romsey	£49.73	£55.92	£66.46	£79.94	£95.78	12.4%	33.7%	60.7%	92.6%
Zone 12: North Baddesley	£64.07	£72.03	£85.59	£102.95	£123.38	12.4%	33.6%	60.7%	92.6%
Zone 13: Southampton Suburbs	£95.84	£106.28	£124.71	£147.28	£173.58	10.9%	30.1%	53.7%	81.1%
Zone 14: Totton	£110.72	£120.71	£142.13	£169.44	£202.03	9.0%	28.4%	53.0%	82.5%
Total	£1,015.84	£1,135.20	£1,343.01	£1,603.67	£1,910.00	11.7%	32.2%	57.9%	88.0%

Sources:

Table 1 and Table 2

Table 4: Comparison Shopping Penetration Rates 2012

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	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	1%	0%	0%
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	32%	3%	3%	2%
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	9%	7%	7%	1%
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%	41%	11%	10%	3%
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	59%	89%	90%	97%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: *NLP adjusted market shares
NEMS Household Survey January 2011 (Zone 10/11)*

Table 5: Comparison Expenditure 2012 £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 2012	£130.74	£123.75	£57.17	£54.12	£62.35	£45.46	£66.79	£32.16	£122.95	£49.73	£64.07	£95.84	£110.72	£1,015.84
Andover	£23.53	£39.60	£23.44	£29.22	£12.47	£18.18	£0.67	£0.64	£0.00	£0.00	£0.64	£0.00	£0.00	£148.40
Romsey	£0.00	£0.00	£0.00	£0.00	£1.87	£2.27	£4.01	£9.01	£4.92	£15.91	£1.92	£2.88	£2.21	£45.00
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.89	£0.00	£4.48	£4.48	£6.71	£1.11	£19.67
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.82
District Total	£23.53	£39.60	£23.44	£29.22	£14.34	£22.27	£4.68	£12.54	£4.92	£20.39	£7.05	£9.58	£3.32	£214.89
Outside District	£107.21	£84.15	£33.73	£24.89	£48.01	£23.18	£62.12	£19.62	£118.03	£29.34	£57.02	£86.25	£107.40	£800.95
Total	£130.74	£123.75	£57.17	£54.12	£62.35	£45.46	£66.79	£32.16	£122.95	£49.73	£64.07	£95.84	£110.72	£1,015.84

Sources: *Table 3 and Table 4*

Table 6: Comparison 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	£146.44	£138.71	£64.30	£60.85	£70.01	£51.10	£74.19	£36.16	£138.51	£55.92	£72.03	£106.28	£120.71	£1,135.20
Andover	£26.36	£44.39	£26.36	£32.86	£14.00	£20.44	£0.74	£0.72	£0.00	£0.00	£0.72	£0.00	£0.00	£166.59
Romsey	£0.00	£0.00	£0.00	£0.00	£2.10	£2.56	£4.45	£10.12	£5.54	£17.89	£2.16	£3.19	£2.41	£50.43
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.25	£0.00	£5.03	£5.04	£7.44	£1.21	£21.98
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.04
District Total	£26.36	£44.39	£26.36	£32.86	£16.10	£25.04	£5.19	£14.10	£5.54	£22.93	£7.92	£10.63	£3.62	£241.04
Outside District	£120.08	£94.32	£37.93	£27.99	£53.91	£26.06	£68.99	£22.06	£132.97	£32.99	£64.11	£95.66	£117.09	£894.15
Total	£146.44	£138.71	£64.30	£60.85	£70.01	£51.10	£74.19	£36.16	£138.51	£55.92	£72.03	£106.28	£120.71	£1,135.20

Sources: Table 3 and Table 4

Table 7: Comparison 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	£173.74	£164.86	£76.41	£72.34	£82.59	£60.74	£87.90	£42.98	£162.55	£66.46	£85.59	£124.71	£142.13	£1,343.01
Andover	£31.27	£52.75	£31.33	£39.06	£16.52	£24.30	£0.88	£0.86	£0.00	£0.00	£0.86	£0.00	£0.00	£197.82
Romsey	£0.00	£0.00	£0.00	£0.00	£2.48	£3.04	£5.27	£12.04	£6.50	£21.27	£2.57	£3.74	£2.84	£59.75
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.87	£0.00	£5.98	£5.99	£8.73	£1.42	£25.99
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.43	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.43
District Total	£31.27	£52.75	£31.33	£39.06	£19.00	£29.76	£6.15	£16.76	£6.50	£27.25	£9.42	£12.47	£4.26	£285.99
Outside District	£142.47	£112.10	£45.08	£33.27	£63.59	£30.98	£81.75	£26.22	£156.05	£39.21	£76.18	£112.24	£137.87	£1,057.01
Total	£173.74	£164.86	£76.41	£72.34	£82.59	£60.74	£87.90	£42.98	£162.55	£66.46	£85.59	£124.71	£142.13	£1,343.01

Sources: Table 3 and Table 4

Table 8: Comparison 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	£207.11	£197.06	£91.91	£86.99	£98.50	£73.06	£104.99	£51.69	£192.75	£79.94	£102.95	£147.28	£169.44	£1,603.67
Andover	£37.28	£63.06	£37.68	£46.97	£19.70	£29.22	£1.05	£1.03	£0.00	£0.00	£1.03	£0.00	£0.00	£237.03
Romsey	£0.00	£0.00	£0.00	£0.00	£2.96	£3.65	£6.30	£14.47	£7.71	£25.58	£3.09	£4.42	£3.39	£71.57
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.65	£0.00	£7.19	£7.21	£10.31	£1.69	£31.06
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.92
District Total	£37.28	£63.06	£37.68	£46.97	£22.66	£35.80	£7.35	£20.16	£7.71	£32.77	£11.32	£14.73	£5.08	£342.58
Outside District	£169.83	£134.00	£54.23	£40.01	£75.85	£37.26	£97.64	£31.53	£185.04	£47.16	£91.63	£132.55	£164.36	£1,261.09
Total	£207.11	£197.06	£91.91	£86.99	£98.50	£73.06	£104.99	£51.69	£192.75	£79.94	£102.95	£147.28	£169.44	£1,603.67

Sources: Table 3 and Table 4

Table 9: Comparison Expenditure 2031 £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 2031	£245.93	£234.56	£110.13	£104.24	£117.33	£87.54	£125.02	£61.94	£228.55	£95.78	£123.38	£173.58	£202.03	£1,910.00
Andover	£44.27	£75.06	£45.15	£56.29	£23.47	£35.02	£1.25	£1.24	£0.00	£0.00	£1.23	£0.00	£0.00	£282.97
Romsey	£0.00	£0.00	£0.00	£0.00	£3.52	£4.38	£7.50	£17.34	£9.14	£30.65	£3.70	£5.21	£4.04	£85.48
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.57	£0.00	£8.62	£8.64	£12.15	£2.02	£37.00
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£3.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.50
District Total	£44.27	£75.06	£45.15	£56.29	£26.99	£42.90	£8.75	£24.16	£9.14	£39.27	£13.57	£17.36	£6.06	£408.96
Outside District	£201.66	£159.50	£64.98	£47.95	£90.35	£44.65	£116.27	£37.78	£219.41	£56.51	£109.80	£156.22	£195.97	£1,501.04
Total	£245.93	£234.56	£110.13	£104.24	£117.33	£87.54	£125.02	£61.94	£228.55	£95.78	£123.38	£173.58	£202.03	£1,910.00

Sources: Table 3 and Table 4

Table 10: Comparison Floorspace and Expected Turnover (2010 prices)

	Net Sales Floorspace Sq M	Turnover Sales Density Per Sq M	Total Turnover £M
Andover Town Centre			
Town Centre Comparison Shops	13,950	£5,250	£73.24
Comparison floorspace in food stores	2,705	£8,000	£21.64
Andover Retail Warehouses	16,937	£2,750	£46.58
Andover Total	33,592		£141.45
Romsey Town Centre			
Town centre comparison shops	7,230	£5,250	£37.96
Comparison floorspace in food stores	266	£8,000	£2.13
Romsey Total	7,496	£5,348	£40.09
Nursling Estate Retail Park	8,170	£2,750	£22.47
Grand Total	49,258	£4,142	£204.01

Sources: GOAD

Table 11: Summary of Comparison Turnover 2012 to 2031 (£Million)

Town	2012	2016	2021	2026	2031
Available Expenditure in District					
Andover	£148.40	£166.59	£197.82	£237.03	£282.97
Romsey	£45.00	£50.43	£59.75	£71.57	£85.48
Nursling Estate Retail Park	£19.67	£21.98	£25.99	£31.06	£37.00
Stockbridge	£1.82	£2.04	£2.43	£2.92	£3.50
Total	£214.89	£241.04	£285.99	£342.58	£408.96
Benchmark Turnover of Existing Facilities					
Andover	£141.45	£151.32	£164.63	£179.11	£194.86
Romsey	£40.09	£42.88	£46.65	£50.76	£55.22
Nursling Estate Retail Park	£22.47	£24.03	£26.15	£28.45	£30.95
Stockbridge	£1.82	£1.95	£2.12	£2.30	£2.50
Total	£205.83	£220.18	£239.55	£260.61	£283.53
Surplus Expenditure					
Andover	£6.95	£15.27	£33.20	£57.93	£88.12
Romsey	£4.91	£7.55	£13.09	£20.81	£30.26
Nursling Estate Retail Park	£-2.80	£-2.06	£-0.16	£2.61	£6.05
Stockbridge	£0.00	£0.10	£0.31	£0.62	£1.00
Total	£9.07	£20.86	£46.45	£81.97	£125.43
Turnover Density for New Floorspace £ per sq m net	£5,250	£5,616	£6,110	£6,647	£7,232
Floorspace (sq m (net))					
Andover	1,324	2,720	5,433	8,715	12,184
Romsey	936	1,344	2,143	3,131	4,184
Nursling Estate Retail Park	-533	-367	-25	393	837
Stockbridge	0	18	51	93	138
Total	1,727	3,714	7,602	12,331	17,344
Floorspace (sq m (gross))					
Andover	1,765	3,626	7,244	11,619	16,246
Romsey	1,248	1,792	2,857	4,174	5,579
Nursling Estate Retail Park	-710	-489	-34	523	1,116
Stockbridge	0	23	68	124	184
Total	2,302	4,952	10,136	16,441	23,125

Sources: Tables 1 to 10



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