



Nathaniel Lichfield and Partners

Planning Design Economics

TEST VALLEY BOROUGH

**RETAIL DEVELOPMENT POTENTIAL
IN ROMSEY**

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Nathaniel Lichfield & Partners Ltd

14 Regent's Wharf
All Saints Street
London N1 9RL

T 020 7837 4477
F 020 7837 2277
london@nlpplanning.com
www.nlpplanning.com

Offices also in:
Cardiff
Manchester
Newcastle upon Tyne

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1.0 INTRODUCTION

The Study

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Test Valley Borough Council to prepare a borough wide retail capacity study of Test Valley Borough, including an assessment of the need for convenience and comparison goods floorspace. The objectives of the May 2007 Study were to provide:
- a qualitative analysis of the existing structure and hierarchy of centres within the sub-region;
 - a qualitative assessment of existing retail facilities in the Borough and an assessment of the future needs for additional retail facilities up to 2026;
 - an assessment of current and future competition from other centres outside the Borough; and
 - recommendations relating to spatial planning policies suitable for inclusion in appropriate development plan documents, which may include advice on preferred broad locations for development, future monitoring and future objectives for emerging LDF policies.
- 1.2 NLP has been commissioned to undertake further analysis of Romsey, as contained in this report. This report draws on the findings of the 2007 Study and should be read alongside the previous report. The analysis considers in more detail the potential for additional convenience and comparison retail floorspace in Romsey. It assesses the scale and type of retail development that could physically be accommodated on sites within the town centre and/or out-of-centre.
- 1.3 The retail capacity projections contained within the 2007 Study assumed that Romsey would maintain its 2006 market share of convenience and comparison expenditure within the study area in the future, apart from a slight reduction in market share for convenience expenditure in the Stockbridge zone following the opening of Asda in Andover. It also assumes high trading levels in 2006 will reduce to benchmark levels in the future.
- 1.4 The report examines future development scenarios, and assesses the degree to which Romsey's market share of expenditure could be improved if certain levels/types of retail development are implemented.

Summary of the 2007 Study Conclusions in Relation to Romsey

1.5 The main conclusions relating to Romsey in the 2007 Study are summarised below.

- There may be some potential for convenience retail development in Romsey, in the form of small stores or extensions to existing stores. If Romsey can claw back expenditure leakage there could be scope for a new food store of at least 1,400 sq m net by 2011.
- If additional residential development is implemented in Romsey, as proposed in the South East Plan, then there may be scope for medium sized stores (about 1,000 to 1,200 sq m net) in Romsey by 2016.
- A significant amount of comparison goods expenditure in Romsey's catchment area is spent at shopping centres outside the Borough, and residents have a significant choice of shopping destinations e.g. Southampton and Winchester.
- Overall comparison retail sales floorspace within the Borough appears to be trading healthily, which is consistent with the low shop vacancy rate.
- Major retail development in the Borough could change existing shopping patterns and could reduce comparison expenditure leakage. Conversely improvements in competing centres may increase expenditure leakage.
- In Romsey there could be scope for about 4,600 to 5,500 sq m net of comparison floorspace by 2016, depending on the mix of high street and retail warehouse floorspace. If the draft South East Plan's additional housing development is implemented then this would increase to 5,800 to 6,900 sq m net by 2016. The draft South East Plan includes proposals for higher growth. Southern Test Valley, which includes Romsey, is expected to accommodate 3,910 dwellings between 2006-2026.

1.6 The main changes in Romsey since the 2007 study are the implementation of commitments at Latimer Street (former Royal British Legion) and Dukes Mill extension (now under-construction). In addition, Waitrose has an application to extend their store. The developments will absorb some of the identified retail capacity.

2.0 EVALUATION OF DEVELOPMENT OPPORTUNITIES

Floorspace Projections

- 2.1 The retail floorspace projections set out in the 2007 Retail Study assume that new shopping facilities within Romsey will help the town maintain its current market share of expenditure within the catchment area. There are a number of issues that may influence the scope for new floorspace in Romsey, as follows:
- major retail developments in competing centres, such as Southampton, Eastleigh and Winchester, which may reduce Romsey's market share;
 - the reliability of long term expenditure projections, particularly after 2016;
 - the effect of Internet/home shopping on the demand for retail property;
 - the acceptability of higher than average trading levels, and the need to reduce future trading levels back to benchmark levels;
 - the level of operator demand for floorspace in Romsey, bearing in mind the proximity of larger centres (e.g. Southampton and Winchester);
 - the potential impact new development may have on existing facilities within Romsey town centre.
- 2.2 Bearing the above issues in mind, a number of options will need to be considered when reviewing potential development sites. PPS6 suggests local authorities should seek to identify sites sufficient to meet the need for new floorspace for at least 5 years (i.e. 2013).
- 2.3 The long term floorspace projections shown in the 2007 study (i.e. up to 2021 and 2026) 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 forecast growth in spending per capita. If the growth in expenditure is lower than that forecast, then the scope for additional retail space will reduce.
- 2.4 We recommend that the Council should seek to identify sites in Romsey capable of meeting floorspace projections no further than 2016.

Accommodating Future Growth

- 2.5 The sequential approach suggests that town centre sites (i.e. within the primary shopping area) should be the first choice for retail development, which is supported by policies within the South East Plan. The ability of Romsey town centre, as the preferred locations for retail development, needs to be considered.
- 2.6 The South East Plan suggests that major development (10,000 sq m gross or more) should be accommodated in the primary and secondary regional centres, which implies that only developments under 10,000 sq m should be promoted in Romsey. In considering the scale of retail development appropriate in Romsey, development should serve Romsey's existing catchment area and should not significantly increase the extent of the catchment area, although development could increase Romsey's market share of expenditure within the existing catchment area. It should be noted that catchment areas overlap and Romsey cannot be expected to retain all, or anything approach 100%, of expenditure in its catchment area.

Potential Development Opportunities

- 2.7 A review of potential development sites within Romsey has been undertaken. A long list of potential development sites have been evaluated, in terms of their implications on the scope and need for additional retail facilities in Romsey. These sites have been assessed against the following factors:

- likely **availability** for development, categorised as follows:
 - short term – up to 2011;
 - medium term – 2011 to 2016;
 - long term - likely to be completed after 2016.
- **land assembly**, categorised as follows:
 - no land assembly required or in single ownership;
 - some land assembly required;
 - difficult land assembly – in multiple ownerships and where the willingness of all owners to develop is uncertain.

<ul style="list-style-type: none"> • sequential approach to site selection, categorised as follows: <ul style="list-style-type: none"> - within the designated primary shopping area; - edge-of-centre site with good linkages to the town centre - within 100 metres from the primary shopping area; - peripheral edge-of-centre site between 100 to 300 metres from the primary shopping area. - out-of-centre site – over 300 metres from the primary shopping area.
<ul style="list-style-type: none"> • commercial potential for retail development and the most likely form of development, categorised as follows: <ul style="list-style-type: none"> - prime site - with the best prospects of attracting a developer and occupiers; - reasonable site – which should be attractive to some, if not all, developers/occupiers; - secondary site – which may generate limited demand or only demand for a specific kind of use.
<ul style="list-style-type: none"> • potential scope to accommodate additional retail floorspace (net increase), categorised as follows: <ul style="list-style-type: none"> - small scale - up to 500 sq m gross floorspace; - medium scale – over 500 to 1,000 sq m gross floorspace; - large scale - over 1,000 sq m gross floorspace;
<ul style="list-style-type: none"> • development constraints: <ul style="list-style-type: none"> - limited evidence of any constraints on development; - some development constraints, but may not be insurmountable; - Development constraints that may be costly and or difficult in to overcome.
<ul style="list-style-type: none"> • Alternative uses: <ul style="list-style-type: none"> - retail likely to be the preferred use; - other proposed uses, such as residential, community or employment uses may be preferable to retail uses; - retention of existing use may be preferable to retail use.

- **Access:**
 - Existing access and serving available;
 - New access can readily be provided;
 - New access may be costly/difficult to provide.

2.8 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- **Good** - development sites with limited constraints that have good prospects for providing additional retail floorspace, and should be considered for implementation in the short to medium term;
- **Reasonable** - development sites which are well located and may provide potential for additional retail floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the medium to long term; and
- **Poor** - development sites that may be unattractive or unsuitable for retail development and where their delivery is very uncertain.

2.9 This overall rating is based on an initial evaluation for each site. The level of analysis undertaken at this stage is broad brush, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site would need to be explored with landowners/developers before opportunities can be brought forward for development or ruled out as viable options.

2.10 The evaluation exercise undertaken for each opportunity are not detailed planning appraisals and do not imply that planning permission should be granted or refused for retail development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration with the emerging LDF process. This evaluation provides a framework within which the Council can consider and test development options for Romsey.

Evaluation of Potential Development Sites

2.11 Each opportunity site identified has been evaluated based on the factors listed earlier in this section. An assessment of each site is provided in Appendix A, and this assessment is summarised in Table 2.1.

2.12 In total 14 potential development opportunities have been identified, four within (or part within) the designated the primary shopping, nine adjacent to the primary shopping area and one out-of-centre site.

Table 2.1: Site Evaluation Summary

Site	Potential Scale Retail Development	Potential Availability	Overall Development Potential
Within Primary Shopping Area			
Site 1 – Latimer Street	Small	Short term	Good
Site 4 – Romsey Post Office	Small	Short term	Good
Site 7 – Rear of The Hundred	Small	Short/medium term	Reasonable
Site 13 – Love Lane	Large	Medium/long term	Reasonable
Edge-of-centre			
Site 2 – Lortemore Place Car Park (East)	Medium	Short term	Good
Site 3 – Lortemore Place Car Park (West)	Small	Short term	Reasonable
Site 5 – Newton Car Park	Medium	Short term	Poor
Site 6 – Romsey Bus Station	Large	Medium term	Reasonable
Site 8 – Aldi Car Park	Large	Long term	Poor
Site 9 – Crosfield Hall	Large	Medium term	Good
Site 10 – Edwina Mountbatten House	Medium	Medium/long term	Reasonable/Poor
Site 11 – Broadwater Road residential area	Large	Long term	Reasonable/Poor
Site 12 – Alma Road Car Park	Large	Short term	Reasonable
Out-of-centre			
Site 14 - Romsey Bypass	Large	Short term	Reasonable*

2.13 The priority should be to seek to accommodate the need for new retail development in the short to medium term (up to 2016). The 2007 retail capacity study suggests there is quantitative capacity for 7,400 sq m gross within Romsey by 2016 (6,100 sq m of comparison and 1,300 sq m gross of convenience floorspace). This capacity could increase to 9,500 sq m gross by 2016 (7,700 sq m of comparison and 1,800 sq m gross of convenience floorspace) if additional draft South East Plan housing development is assumed. The floorspace projections assume 2006 trading levels will reduce to benchmark trading levels in the future, therefore the impact of meeting or exceeding these projections needs to be carefully considered.

Commitments and Proposals

2.14 The under construction Latimer Street development is expected to provide 531 sq m gross of new retail floorspace (8 new small units ranging from 43 to 85 sq m gross). The Dukes Mill redevelopment is expected to provide an additional 236 sq m gross retail floorspace, plus 430 sq m gross of the Co-op store will be converted to unit shops. The Co-op store had down-sized at the time of the 2007 study and was part vacant, and therefore the proposals will not affect convenience expenditure capacity, but the occupation of the vacated part of the Co-op store could help to absorb

comparison expenditure capacity.

- 2.15 Waitrose's proposal to extend their store will provide an additional 306 sq m net, which would increase the convenience benchmark turnover of the store by £3.28 million. If implemented the Waitrose extension will reduce the 2016 convenience floorspace projection in Romsey from about 1,300 sq m gross to only 700 sq m gross, or from 1,800 sq m gross to about 1,200 sq m gross, if higher draft South East Plan housing figures area assumed.
- 2.16 Commitments and proposals could reduce the overall 2016 retail floorspace projection in Romsey from 7,400 sq m gross to 5,600 sq m gross (split 4,900 sq m of comparison and 700 sq m gross of convenience floorspace). Based on draft South East Plan housing development the post commitments/proposals projection is 7,700 sq m gross by 2016 (6,500 sq m of comparison and 1,200 sq m gross of convenience floorspace).

Other Opportunities within the Primary Shopping Area

- 2.17 The four sites identified within the Primary Shopping Area, if implemented, could deliver up to 2,400 sq m gross of new retail floorspace in the form of traditional high street shops. These four sites along with existing commitments and proposals are capable of meeting between 44% to 57% of the overall 2016 retail capacity projection (7,400 to 9,500 sq m gross).
- 2.18 The main site that could deliver a reasonable increase in retail floorspace is Site 13 – Love Lane (about 1,500 sq m gross), but this site may be difficult to assemble due to multiple ownerships and high density development would be required to make this viable. Furthermore, none of the sites appear to be capable of accommodating large format stores (1,000 sq m gross or over) suitable for large food stores or retail warehouses.
- 2.19 In order to meet all the retail capacity projections up to 2016, development opportunities beyond the Primary Shopping Area will need to be identified. Of the nine edge-of-centre sites, five have an overall development rating of "reasonable" or "good". Site 5 - Newton Lane car park is rated as "poor" because of its peripheral location, lack of road frontage and potential loss of public car parking (70 spaces). The redevelopment of the Aldi car park is also rated as "poor" because Aldi is unlikely to relinquish their customer parking, and the site will probably only become available if the Aldi store closes. It may be unlikely Aldi will seek to extend their store because

it could result in a loss of car parking and the existing store is not particularly under-sized for Aldi.

- 2.20 Two other edge-of-centre sites (Site 10 – Edwina Mountbatten House care home and Site 11 – residential area) are also rated as “poor” due to availability, land assembly and/or financial viability issues. However, the development prospects for either of these two sites may be improved if redevelopment is linked with the redevelopment of Site 9 – Crosfield Hall.
- 2.21 The five sites rated as “reasonable” or “good” could, if implemented, deliver up to 7,500 sq m gross of new retail floorspace, and these sites along with commitments/proposals and the sites within the Primary Shopping area (1,600 sq m gross and 2,400 sq m gross respectively) could in theory meet all of the retail floorspace projection for Romsey up to 2016 (7,400 to 9,500 sq m gross). The most likely development scenario would be for either Site 6, 9 or 12 to accommodate a food store of 1,500 to 2,000 sq m gross (1,000 to 1,300 sq m net), with the other sites accommodating predominantly comparison retail development. This scale of development would not significantly change Romsey’s market share of comparison or convenience expenditure within the study area, and this scale of development could be supported if Romsey maintains its existing market share up to 2016.
- 2.22 It is unlikely that all nine sites will be implemented by 2016, and the amount of floorspace delivered by these sites is likely to be significantly less than 9,900 sq m gross. The availability of a number of the sites is uncertain. The five edge-of-centre sites currently contain about 500 public car parking spaces, over 70% of the total town centre provision, and it may not be possible to retain all of the car parking spaces on site if redevelopment is implemented. The redevelopment of some sites may require the provision of under-croft or multi-storey car parking on site, or the provision of new car parking elsewhere in the town centre. For example the provision of multi-storey car parking could be considered on one of the larger opportunity sites, in order to release other car park sites for redevelopment. In addition, the relocation of the bus station will probably be required to redevelop Site 6.
- 2.23 The development of Site 9 (Crosfield Hall) along with adjacent land (either Site 10 or 11 or both) appears to be critical in terms of Romsey’s ability to accommodate retail growth within or on the edge of the town centre. If Site 10 (Edwina Mountbatten House) and/or at least part of the residential estate to the west of Crosfield Hall can be assembled then a development site area of between 0.8 to 1.3 ha could be

available. A food store of between 3,000 to 4,000 sq m gross (2,000 to 2,500 sq m net) could be accommodated on the site, which could help Romsey retain a higher proportion of convenience expenditure within the catchment area. This store size relates to the capacity of the site rather than the projected need for new floorspace. The total amount of comparison retail development on this enlarged site could be between 3,000 to 5,000 sq m gross, which would make a significant contribution towards meeting the remaining post commitments comparison floorspace projection (4,900 to 6,500 sq m gross up to 2016), with limited impact on public car parking provision.

- 2.24 The Romsey Bypass site (Site 14) is out-of-centre, and should only be considered for retail development if the need for new floorspace cannot realistically be accommodated within the other opportunities identified in this report. The site is large enough to accommodate all of the projected need for retail development in Romsey for the foreseeable future (i.e. up to 15,000 to 20,000 sq m gross). The impact of major retail development on this site on Romsey town centre and other town centres would need to be carefully considered.

3.0 DEVELOPMENT OPTION APPRAISAL

Romsey Town Centre

3.1 Retail development in Romsey could help to reduce expenditure leakage from the town’s catchment area. However, new development will also divert trade from existing retail facilities within the town centre. It necessary to achieve an appropriate balance to ensure the scale of development is sufficient to claw back expenditure leakage without undermining the vitality and viability of the town centre.

3.2 The 2007 retail study suggests the town centre is currently trading healthily above benchmark turnover levels. The vacancy rate in October 2007 was less than 2% compared with the national average of approximately 11%. It is also important to note that Romsey town centre’s vitality and viability does not only rely on retail uses. About 38% of the units (66 units) occupied in the town centre are non-Class A1 uses, including A2 financial services, A3 to A5 (restaurants, bars and takeaways). The breakdown of the centre’s 110 Class A1 uses is as follows:

- Food and grocery shops - 12
- Off-licences - 2
- Newsagents/stationery/books - 9
- Chemists - 5
- Clothes/shoes - 19
- General/household goods - 8
- Charity shops - 7
- Other comparison shops - 30
- Non-retail services (e.g. hair/beauty, travel, repairs etc.) - 18.

3.3 The degree to which new development will divert trade from the town centre will be dependent on the overlap in the types of goods sold. The location of new development will also influence the amount of spin-off trade that new development could generate for existing businesses in the town centre. For example an edge of centre development is likely to divert trade from shops in the town centre selling similar goods, but may generate additional trade for other retail and service businesses in the town centre. An out-of-centre development is less likely to generate spin-off trade.

Convenience Retail Facilities

3.4 The 2007 retail capacity projections suggest there should be expenditure capacity to support a medium sized food supermarket in Romsey of between 900 to 1,200 sq m

net (1,300 to 1,800 sq m gross) by 2016, based on existing market shares. However, this projection would reduce to 700 to 1,200 sq m gross if the proposed Waitrose extension is implemented. Nevertheless a new food store could help to increase Romsey's market share of expenditure.

- 3.5 A food store of between 1,300 to 1,800 sq m gross could be accommodated on an edge-of-town centre site. Alternatively, a new store could be provided within a new neighbourhood centre, serving major new residential development or on the Romsey Bypass.
- 3.6 This size of food store (1,300 to 1,800 sq m gross) would cater primarily for basket and top up shopping trips, rather than bulk food shopping trips predominantly attracted by the existing Waitrose. For example a Mark & Spencer *Simply Food* or Sainsbury *Local* operation could occupy a store of this size. A store of this size would provide more choice in Romsey and would help to relieve in-store congestion at peak times within existing stores. However, it is unlikely that a store of this size would significantly change Romsey's market share of convenience expenditure and the store would have a limited affect on the claw back of expenditure leakage, but it may assist in preventing Romsey from losing further expenditure.
- 3.7 The 2007 capacity projections indicate that this scale of food store is unlikely to harm the vitality and viability of existing food stores in Romsey, and would not harm the vitality and viability of the town centre.
- 3.8 Alternatively, a larger food store suitable for main or bulk food shopping could be developed, with a sales area of between 1,800 to 2,000 sq m net (about 3,000 sq m gross). This would be comparable in size to the existing Waitrose store and should assist in helping to increase Romsey's market share of convenience expenditure. The most likely operators for a store of this size would be Asda, Sainsbury or Tesco.
- 3.9 Another option could be the development of a large food superstore with a convenience sales area of at least 2,500 sq m net (4,000 sq m gross or more). These food store development options could be accommodated out-of-centre on the Romsey Bypass or edge of centre to the south of Broadwater Road, if a large enough site can be assembled.
- 3.10 Three food store development scenarios have been tested, as follows:
 - within or edge of centre town centre supermarket of up to 1,200 sq m net (turnover up to £12 million);

- within or edge of centre town centre large food store of 2,000 sq m net (turnover up to £24 million); and
- out of centre food superstore of 2,500 sq m net (turnover up to £30 million)

Scenario 1 – 1,200 sq m net Food Store

- 3.11 The tables in Appendix B rework the 2007 retail capacity tables in order to assess the potential impact of a food store of a 1,200 sq m net store at 2011 and 2016. Table 1B sets out Romsey's market penetration rates within the study area zones, assuming no major food store development is implemented. Future trading patterns in 2011 and 2016 are shown in tables 3B and 4B.
- 3.12 A food store of 1,200 sq m net could have a turnover of about £12 million (assuming £10,000 per sq m net) if it is occupied by a major retailer e.g. Sainsbury or Marks & Spencer. The trade draw of this store has been estimated in Table 2B.
- 3.13 Shopping patterns with the new store at 2011 and 2016 are shown in Tables 5B and 8B, and the level of trade diversion and impact is summarised in Table 11B. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12B.
- 3.14 The retail analysis indicates that Romsey will attract a convenience turnover of £36.27 million in 2011, compared with the benchmark turnover of £30.60 million (as adopted in the 2007 Study – Table 1A). The proposed Waitrose extension would increase this benchmark turnover to £33.88 million, which suggest existing and proposed convenience floorspace should be trading about 7% above the benchmark turnover in 2011. By 2016 existing and proposed floorspace should be trading 16.8% above benchmark turnover levels (+£5.7 million), if existing market shares can be maintained.
- 3.15 If developed, a food store of 1,200 sq m net (with a turnover of £12 million in 2011) is expected to reduce the turnover of existing facilities in Romsey from £36.27 million to £27.27 million, an average impact of 22.1% in 2011. In total two thirds of the new store's turnover is estimated to be diverted from other facilities in Romsey. Existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 16.6% below the benchmark turnover in 2011, and by 2016 trading performance would increase to £31.46 million (7% below benchmark).
- 3.16 These figures confirm there is no over-riding need for a food store of this size in

Romsey in the short term, particularly if the Waitrose extension is implemented, although the development of an edge-of-centre store towards the end of the period 2011 and 2016 is unlikely to harm the vitality and viability of the town centre or cause the closure of existing stores. Existing facilities will only be marginally trading below benchmark levels (7%), and most of the impact is likely to fall on the three main stores (Waitrose, Aldi and Co-op). In addition a new store of this size is estimated to claw back an additional £4.06 million of convenience expenditure in 2016, which could benefit other non-convenience shops and non-retail services within the town centre, through the generation of additional linked shopping trips.

- 3.17 If higher draft South East Plan population projections are adopted then the impact figures are only marginally lower in 2011. However by 2016 a new food store of 1,200 sq m net is expected to reduce the turnover of existing facilities in Romsey from £42.89 million to £34.77 million, and existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 3% above the benchmark turnover in 2016. A store of this size could be supported based on higher draft South East Plan housing figures by 2016.

Scenario 2 – 2,000 sq m net Food Store

- 3.18 The tables in Appendix B also rework the 2007 retail capacity tables to assess the potential impact of a 2,000 sq m net food store at 2011 and 2016. A food store of 2,000 sq m net could have a turnover of about £24 million (assuming £12,000 per sq m net) if it is occupied by a major retailer e.g. Asda, Sainsbury or Tesco. The trade draw of this store has been estimated in Table 2B.
- 3.19 Shopping patterns with the new store at 2011 and 2016 are shown in Tables 6B and 9B, and the level of trade diversion and impact is summarised in Table 11B. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12B.
- 3.20 If developed, a food store of 2,000 sq m net (with a turnover of £24 million in 2011) is expected to reduce the turnover of existing facilities in Romsey from £36.27 million to £23.61 million, an average impact of about 35% in 2011. Existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 30% below the benchmark turnover in 2011, and by 2016 trading performance would increase to £26.72 million, still 13.5% below benchmark (-£4.16 million). These figures suggest a food store of this size may not be viable from an operator's

perspective in the short term (around 2011).

- 3.21 The figures also suggest a store of 2,000 sq m net could harm existing convenience shopping provision in Romsey, particularly if opened around 2011. The figures also suggest there is no over-riding need for a food store of this size in Romsey for the foreseeable future. However, an edge-of-centre store would help to claw back an additional £11.5 million of convenience expenditure in 2016, which would benefit other non-convenience and non-retail services within the town centre, through the generation of additional linked shopping trips.
- 3.22 If higher draft South East Plan population projections are adopted then a food store of 2,000 sq m net is expected to reduce the turnover of existing facilities in Romsey from £42.89 million to £30.03 million in 2016, and existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 11% below the benchmark turnover in 2016. These figures suggest a food store approaching 2,000 sq m net could be achieved by (or after 2016) if the higher draft South East Plan population figures area achieved. However, the impact on the town centre would need to be carefully considered, which will determine the scale of store which will be appropriate at that time.

Scenario 3 – 2,500 sq m net Food Store

- 3.23 The tables in Appendix B rework the 2007 retail capacity tables to assess the potential impact of a 2,500 sq m net food store at 2011 and 2016. A food store of 2,500 sq m net could have a turnover of about £30 million (assuming £12,000 per sq m net) if it is occupied by a major retailer e.g. Asda, Sainsbury or Tesco. The trade draw of this store has been estimated in Table 2B.
- 3.24 Shopping patterns with the new store at 2011 and 2016 are shown in Tables 7B and 10B, and the level of trade diversion and impact is summarised in Table 11B. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12B.
- 3.25 If developed, a food store of 2,500 sq m net (with a turnover of £30 million in 2011) is expected to reduce the turnover of existing facilities in Romsey from £36.27 million to £22.26 million, an average impact of 38.6% in 2011. Existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 34% below the benchmark turnover in 2011, and by 2016 trading performance would increase to £25.35 million, still 25% below benchmark (-£8.53 million).

- 3.26 These figures suggest a store of 2,500 sq m net may harm existing convenience shopping provision in Romsey. The figures suggest there is no over-riding need for a food store of this size in Romsey for the foreseeable future.
- 3.27 If higher draft South East Plan population projections are adopted then a food store of 2,500 sq m net is expected to reduce the turnover of existing facilities in Romsey from £42.89 million to £28.66 million in 2016, and existing convenience facilities in Romsey (including the extended Waitrose) would be trading 15.4% below the benchmark turnover in 2016, which suggest a store of this size is not needed by 2016, even based on higher draft South East Plan population.

Comparison Retail Facilities

- 3.28 The 2007 retail capacity projections suggest there should be expenditure capacity to support 6,100 sq m gross of high street comparison shopping in Romsey by 2016, based on existing market shares. The evaluation of sites in the previous section suggests it will be difficult to accommodate all this floorspace projection within or adjacent to the town centre, and there appears to be limited scope to improve Romsey's market share of comparison expenditure through the implementation of developments in the town centre.
- 3.29 The 2007 study suggested that some forms of retailing may not be capable of being accommodated within high street shops, and large format stores/retail warehouses may be required. An alternative mix of comparison retail provision was suggested on the basis that 20% of surplus expenditure is accommodated in retail warehouse type stores. On this basis, the floorspace projections for Romsey by 2016 are 4,900 sq m gross of high street comparison shops and 2,100 sq m gross for retail warehousing. The alternative figures assuming higher draft South East Plan housing development was 9,100 and 4,000 sq m gross respectively.
- 3.30 It may be reasonable to assume that commitments/proposals (1,200 sq m gross) and the town centre and edge-of-centre opportunity sites can accommodate most if not all of the high street comparison shop projection up to 2016.
- 3.31 The development of retailing warehousing on the Romsey by-pass could provide an opportunity to meet the 2,100 sq m gross projection, or a larger development could help to increase Romsey's market share of comparison expenditure.
- 3.32 Three retail warehouse development scenarios have been tested, as follows:

- up to 4,000 sq m gross (turnover up to £8.5 million);
- up to 6,000 sq m gross (turnover up to £12.75 million); and
- up to 8,000 sq m gross (turnover up to £17.0 million).

3.33 This form of development is most likely to include traditional retail warehouse operators, such as:

- DIY store (2,000 to 3,000 sq m gross);
- Furniture stores (1,000 to 2,000 sq m gross);
- Soft furnishings (about 1,000 sq m gross);
- Carpet store (about 1,000 sq m gross);
- Electrical store (about 1,000 sq m gross);
- Car part, cycles/accessories (about 1,500 sq m gross); and/or
- Pet store (about 1,000 sq m gross).

3.34 The degree to which a retail warehouse development can claw back expenditure leakage and the likely trade diversion from the town centre will be determined by the mix of occupiers attracted to the scheme. The analysis in this section assumes a mix of uses as listed above.

Scenario 1 – 4,000 sq m Gross of Retail Warehousing

3.35 The tables in Appendix C rework the 2007 retail capacity tables in order to assess the potential impact of retail warehouse development of 4,000 sq m gross at 2011 and 2016. Table 1C sets out Romsey's existing market penetration rates within the study area zones. Future trading patterns in 2011 and 2016 are shown in tables 3C and 4C.

3.36 A retail warehouse development of 4,000 sq m gross could have a turnover of about £8.5 million (assuming a net to gross ratio of 85% and an average sales density of £2,500 per sq m net), which is a suitable average for a mix of the types of retailers listed above. The trade draw of this development has been estimated in Table 2C.

3.37 Shopping patterns with the retail warehouse development at 2011 and 2016 are shown in Tables 5C and 8C, and the level of trade diversion and impact is summarised in Table 11C. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12C.

3.38 The 2007 retail study suggests that the comparison good turnover of existing facilities in Romsey was £46.99 million in 2006, which should increase to £57.14 million in 2011. This growth in available expenditure (+£10.15 million) is more than sufficient

to support the Latimer Street and Dukes Mill developments, which are likely to have a combined comparison turnover of about £5 million.

- 3.39 If developed, a retail warehouse development of 4,000 sq m gross (with a turnover of £8.5 million in 2011) is expected to reduce the turnover of existing facilities in Romsey from £57.14 million to £54.35 million, an average impact of 4.9% in 2011. This residual turnover is about 16% (£7.35 million) higher than base year trading levels in 2006, and there is still expenditure capacity to support commitments by 2011, plus a further 1,700 sq m gross of other high street comparison retail development.
- 3.40 These figures confirm there is quantitative capacity for further comparison retail development, over and above commitments, in Romsey in the short term. The development of a retail warehouse scheme selling the types of goods listed above, could help to claw back expenditure leakage from the town's catchment area, and this scale of development is unlikely to harm the vitality and viability of the town centre.
- 3.41 If higher draft South East Plan population projections are adopted then the impact figures will be marginally lower.

Scenario 2 – 6,000 Sq M Gross of Retail Warehousing

- 3.42 The tables in Appendix C also assess the potential impact of 6,000 sq m net gross of retail warehousing at 2011 and 2016. This development could have a turnover of about £12.75 million and the trade draw has been estimated in Table 2C.
- 3.43 Shopping patterns with the new development at 2011 and 2016 are shown in Tables 6C and 9C, and the level of trade diversion and impact is summarised in Table 11C. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12C.
- 3.44 This scale of development is expected to reduce the turnover of existing facilities in Romsey from £57.14 million to £53.41 million, an average impact of 6.5% in 2011. Existing comparison facilities in Romsey will still be trading about 14% above base year trading levels (+£6.42 million), which suggest there would also be scope for the Latimer Street and Dukes Mill commitments by 2011, plus a further 1,500 sq m gross of other high street comparison retail development.
- 3.45 This scale of development, selling the types of goods listed above, is also unlikely to harm the vitality and viability of the town centre.

Scenario 3 – 8,000 Sq M Gross of Retail Warehousing

- 3.46 The tables in Appendix C assess the potential impact of 8,000 sq m net gross of retail warehousing. This development could have a turnover of about £17 million and the trade draw has been estimated in Table 2C.
- 3.47 Shopping patterns with the new development at 2011 and 2016 are shown in Tables 7C and 10C, and the level of trade diversion and impact is summarised in Table 11C. The impact analysis has also been undertaken with draft South East Plan housing development (i.e. higher population growth) as summarised in Table 12C.
- 3.48 This scale of development is expected to reduce the turnover of existing facilities in Romsey from £57.14 million to £52.62 million, an average impact of 7.9% in 2011. Existing comparison facilities in Romsey will still be trading about 12% above 2006 trading levels (+£5.63 million), which again suggests there would also be scope for the Latimer Street and Dukes Mill commitments by 2011, plus a further 1,300 sq m gross of other high street comparison retail development.
- 3.49 Again, this scale of development, selling the types of goods listed above, is unlikely to harm the vitality and viability of the town centre. However, the scale of development in relation to Romsey's existing role and position within the shopping hierarchy may be an issue. The South East Plan suggests Romsey is not a suitable location for large scale retail development. This level of development (8,000 sq m gross), particularly in the short term, may limit the potential for other comparison development within the town centre.

4.0 RECOMMENDATIONS

Introduction

4.1 This report highlights a number of potential options that could be considered in Romsey. These options should be considered in terms of:

- **Short term** - development likely to be completed in the first half of the period 2011 to 2016;
- **Medium term** - development likely to be completed in the second half of the period 2011 to 2016; and
- **Long term** - development likely to be completed after 2016 in the period up to 2026.

4.2 The strategy for comparison and convenience retail development should be considered in this context, recognising the uncertainties relating to long term projections by 2016. We believe it would be inappropriate to allocate sites to meet emerging long term growth at this stage due to these uncertainties. Long term projections should be monitored and the development strategy may need to be modified to reflect future changes.

4.3 We recommend that the Council should seek to identify sites in Romsey capable of meeting floorspace projections no further than 2016.

Development Capacity

4.4 The evaluation of development sites indicates that commitments and potential sites with at least reasonable prospects to deliver additional retail floorspace could in theory meet all of the retail floorspace projection in Romsey up to 2016. However the availability of some sites is uncertain and it is unlikely all these sites can be delivered. The need to retain public car parking levels will also reduce development capacity in the town centre.

4.5 The area to the south of the town centre i.e. Crosfield Hall along with Edwina Mountbatten House and/or the residential area to the west is the main opportunity to extend the primary shopping area within the town centre.

- 4.6 The development of other sites may involve the loss of public car parking spaces, and the provision of multi-storey or decked replacement car parking would be required if a number of the identified sites are redeveloped.
- 4.7 Land on the Romsey Bypass could meet the need for large format retail development in Romsey, and could accommodate additional development that will increase the town's market share of expenditure. However, retail development in this location should only be considered if other more central opportunities cannot be delivered, based on the sequential approach.

Strategy Options

- 4.8 In summary there appear to be four broad development strategy approaches for retail uses in Romsey, as follows:
- **Status Quo** - assuming limited development due to the physical constraints and character of Romsey.
 - **Medium Growth** - assuming development capable of maintaining Romsey's existing position in the shopping hierarchy.
 - **Draft South East Plan Growth** - as for medium growth but assuming further development capable of meeting the additional need arising from draft South East Plan housing projections; or
 - **High Growth** - a more radical approach assuming an up-lift in Romsey's position in the shopping hierarchy, which may in part be assisted by additional need arising from draft South East Plan housing projections.
- 4.9 The implications of each approach, and how they might be delivered, are addressed below.

Status Quo

- 4.10 If the Council concludes that town and edge-of-centre sites cannot deliver a reasonable level of additional retail floorspace, and the disbenefits of allowing out-of-centre development in terms of impact, sustainability and other material considerations out-weigh the benefits of new retail development, then it may be appropriate to assume Romsey cannot maintain its current market share of retail expenditure in the catchment area. This approach may result in a decline in market share up to 2016.
- 4.11 In this approach, limited development over and above existing commitments and

proposals (e.g. Dukes Mill, Latimer Street and Waitrose) would be promoted in Romsey during the period up to 2016.

- 4.12 Commitments and proposals will only absorb just over 40% of the convenience floorspace capacity up to 2016, and about 20% of the comparison capacity.
- 4.13 In terms of expenditure leakage this approach could result in a maximum of £4.8 million of additional convenience expenditure leakage in 2016 (12% of total expenditure that would otherwise have been available in Romsey). Alternatively existing floorspace would continue to trade up to about 14% above benchmark levels in 2016. The implications of this approach in terms of high trading/in-store congestion and/or the increase in convenience expenditure leakage are not significant.
- 4.14 For comparison retailing the maximum increase in expenditure leakage at 2016 is £21.1 million (30% of total expenditure that would otherwise have been available in Romsey). Alternatively existing comparison floorspace would trade up to 43% above benchmark levels in 2016. However, a combination of expenditure leakage and higher than expected trading levels is most likely.

Medium Growth

- 4.15 This approach would seek to maintain Romsey's existing market share of both comparison and convenience expenditure up to 2016, and in order to achieve this further retail development over and above commitments would need to be achieved. This approach may be the most consistent with the current Core Strategy Preferred Options.
- 4.16 This approach would require sites to be identified to accommodate about 700 sq m gross of convenience floorspace and 4,900 sq m gross of comparison floorspace by 2016, or 5,600 sq m gross in total.
- 4.17 Identified sites in the Primary Shopping Area could deliver up to 2,400 sq m gross, whilst adjacent sites could deliver up to a further 7,500 sq m gross. Three of the four sites in the primary shopping area are relatively small scale. The priority development sites for further consideration by the Council are:
- Site 2 – Lortemore Place car park East (potential up to 1,000 sq m gross)
 - Site 6 – Romsey Bus Station (potential up to 2,000 sq m gross);
 - Site 9 – Crosfield Hall (potential up to 1,500 sq m gross);

- Site 12 – Alma Road car park (potential up to 2,000 sq m gross); and
- Site 13 - Love Lane (potential up to 1,500 sq m gross).

4.18 Even allowing for some small scale development in the primary shopping area, at least three of these opportunity sites would need to be delivered to accommodate the overall 2016 floorspace projection (5,600 sq m gross).

4.19 The provision of multi-storey/decked car parking on one of the car park sites (e.g. Crosfield Hall or Alma Road car park), could help to increase the development capacity on other sites, i.e. in effect a land swap.

Draft South East Plan Growth

4.20 As for medium growth, this approach would seek to maintain Romsey's existing market share of both comparison and convenience expenditure up to 2016, and to seek to accommodate additional expenditure taking on board higher draft South East Plan housing projections.

4.21 This approach would require sites to be identified to accommodate about 1,200 sq m gross of convenience floorspace and 6,500 sq m gross of comparison floorspace by 2016, or 7,700 sq m gross in total.

4.22 Again the priority development sites for further consideration by the Council are:

- Site 2 – Lortemore Place car park East (potential up to 1,000 sq m gross)
- Site 6 – Romsey Bus Station (potential up to 2,000 sq m gross);
- Site 9 – Crosfield Hall (potential up to 1,500 sq m gross);
- Site 12 – Alma Road car park (potential up to 2,000 sq m gross); and
- Site 13 - Love Lane (potential up to 1,500 sq m gross).

4.23 Probably all of these sites would need to be delivered to accommodate the entire 2016 floorspace projection (7,700 sq m gross). However, the potential to extend Site 9 (Crosfield Hall) to the west or east should also be explored. Site 9 could accommodate a new food store of 1,200 sq m gross (with about 100 to 120 car parking spaces), but other comparison retail uses could also be provided if adjacent land is also assembled for development. If an additional 0.2 ha can be assembled from adjacent sites (sites 10 or 11), to provide a development site of at least 0.7 ha, then a larger food store of between 1,800 to 2,000 sq m gross could be accommodated with up to 200 surface car parking spaces. It may be possible to

accommodate a larger store if deck/underground car parking was provided, but the construction cost of this would be higher.

- 4.24 Alternatively, a new neighbourhood centre could be developed within major housing development areas, to meet at least some of the projected need for retail floorspace.

High Growth

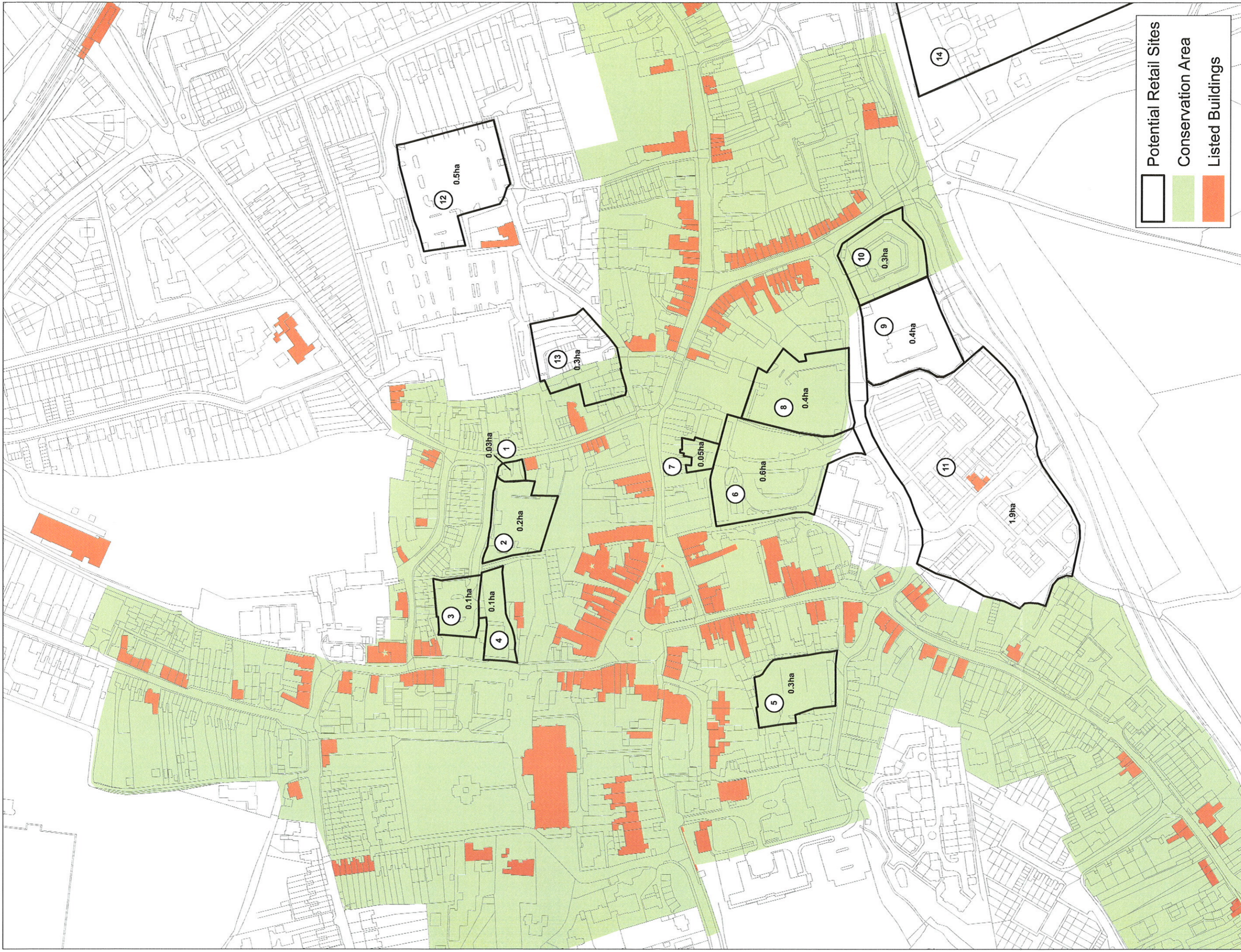
- 4.25 This approach would seek to enhance Romsey's existing market share of expenditure by 2016, and would seek to claw back expenditure leakage.
- 4.26 In order to achieve a significant increase in convenience expenditure retention in Romsey, we believe a new large food store of 1,800 to 2,000 sq m net (3,000 sq m gross) would need to be developed. The impact analysis in Section 3 suggests a store of this size would divert a significant amount of trade from existing facilities, and even allowing for an increase in expenditure retention, there would be an expenditure deficit of about -£9 million in 2016. This development may only be viable toward the latter end of the period 2011 to 2016, and in order to minimise impact on the town centre, this store would ideally be located on an edge-of centre site. The area south of Broadwater Road appears to be the most likely option, i.e. if a site large enough can be assembled (about 1 hectare). This approach may be more appropriate if higher draft South East Plan housing figures are achieved.
- 4.27 The physical capacity of sites within and adjacent to the town centre suggests a significant increase in comparison expenditure market can only be achieved if a large development site is assembled south of Broadwater Road (to accommodate say up to 5,000 sq m gross).
- 4.28 Alternatively a retail warehouse park could be developed on the Romsey By-pass, if town centre development sites cannot be delivered. The retail impact analysis suggests this form of development, if restricted to goods traditionally sold within retail warehouses (DIY, furniture, carpets and electrical goods), may not harm the vitality and viability of the town centre. A development of between 4,000 to 6,000 sq m gross could be considered, subject to the tests in PPS6 and the suitability of out-of-centre sites for development.

Local Development Framework Case Studies

- 4.29 The review of LDF case studies in Appendix D indicates a number of different approaches have proved successful. The nature of town centre policies in the Core Strategies varies, with different levels of detail on retail hierarchies, retail capacity, town centre boundaries, site allocations and town centre policies.
- 4.30 The most common theme within the Core Strategies is the identification of the retail hierarchy, and links to the policy tests within PPS6. In general the Core Strategies provide limited guidance on retail development and town centres, with most of the detail left for other DPD's and AAP's. Test Valley's emerging Core Strategy provides more detail than most of the Core Strategies assessed.
- 4.31 The extent of evidence base studies also varies. Most of the Core Strategies indicate that retail and town centre issues will be explore in more detail and refined at a later stage, e.g. through AAP's and DPD's. These documents will rely on evidence base studies. We believe the evidence based work undertaken by Test Valley should provide an adequate basis to take the Core Strategy forward and can underpin subsequent AAP's.
- 4.32 At present there is limited guidance on how town centre boundaries should be designated and the format of town centre policies to control changes of use and maintain vitality and viability. Test Valley's review of town centre boundaries and primary and secondary frontages for AAP's appears to be a sound approach.

Appendix A

Evaluation of Potential Development Sites



Potential Retail Sites

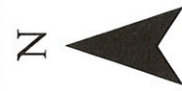
Scale: Not to scale

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TEST VALLEY
BOROUGH COUNCIL

March 2008



Potential Retail Sites

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Scale: Not to scale

April 2008




TEST VALLEY
BOROUGH COUNCIL


SITE 1: LATIMER STREET

Evaluation Criteria	Comment
	<p>The area at the front of the Lortemore Place public car park could be developed to provide an active commercial frontage on to Latimer Street. The site is currently occupied by 10 car parking spaces. The site area is about 300 sq m. The site could be development in isolation or with Site 2 (the remainder of the Lortemore Place car park – east) to provide a larger scheme.</p>
Availability	Short term – could be immediately available for development.
Land Assembly	No land assembly required - the site appears to be in single ownership.
Sequential approach to site selection	Within Primary Shopping Area .
Scale of Development (retail – Class A1 to A5)	Small scale – up to three small units (not more than 200 sq m gross at ground floor level).
Commercial Potential	Prime site with good road frontage on to Latimer Street and is within the Primary Shopping Area as designated in the Local Plan. The site is close to the Latimer Walk development, which will provide active shop frontages linking Latimer Street to the Waitrose store and the main town centre car parks. The site should have good potential to attract independent retailers or Class A2 to A5 uses.
Development Constraints	<p>Some development constraints - within conservation area and immediately adjacent to a listed building, therefore, careful scale, massing and design will be required.</p> <p>Development would result in a minor loss of car parking.</p>
Alternative uses	Retail preferred use , but the benefits of retail development will need to be weighed up against the loss of existing car parking spaces.
Access	Existing access from Lortemore Place.
Overall Development Prospects	Good


SITE 2: LORTEMORE PLACE MAIN CAR PARK (EAST)

Evaluation Criteria	Comment
	This surface level public car park provides a potential development site of about 0.2ha. The site could be development in isolation or with Site 1 (the front part of the Lortemore Place car park). This part of the public car park provides about 70 medium stay car parking spaces.
Availability	Short term – could be immediately available for development, if an alternative site to relocate the public car park is not required.
Land Assembly	No land assembly required - the site is in Council ownership.
Sequential approach to site selection	Edge of centre but immediately adjacent to the Primary Shopping Area.
Scale of Development (retail – Class A1 to A5)	Medium scale – up to 1,000 sq m gross at ground floor level. The site could accommodate a single freestanding retail unit with some limited surface customer car parking, or the potential for under-croft car parking. Alternatively a parade of 5-7 small shops units fronting on to Lortemore Place with rear servicing could be provided. Residential or office uses could be provided on upper floors.
Commercial Potential	Reasonable site with good road frontage on to Lortemore Place and visibility from Latimer Street. It is immediately adjacent to the Primary Shopping Area as designated in the Local Plan, and is within close proximity to the Latimer Walk development, which will provide active shop frontages linking Latimer Street to the Waitrose store and the main town centre car parks. The site should have good potential to attract small independent retailers or Class A2 to A5 uses, or a single large format space uses.
Development Constraints	Some development constraints - within conservation area and adjacent to a Grade I listed building, therefore, careful scale, massing and design will be required. There is a small stream on the west edge of the site. The loss of public car parking may be undesirable if not replaced on site.
Alternative uses	Retention of existing public car park use may be preferred use for this site.
Access	Existing access from Lortemore Place.
Overall Development Prospects	Good (subject to the acceptability of the loss of public car parking)


SITE 3: LORTEMORE PLACE MAIN CAR PARK (WEST)

Evaluation Criteria	Comment
	<p>This surface level public car park provides a potential development site of about 0.1ha. The site could be development in isolation or with Site 4 (the Post Office/Royal Mail Sorting Office). This area of the car park provides 28 medium stay car parking spaces.</p>
Availability	Short term – could be immediately available for development, if an alternative site to relocate the public car park spaces is not required.
Land Assembly	No land assembly required - the site is in Council ownership.
Sequential approach to site selection	Edge of centre but immediately adjacent to the Primary Shopping Area.
Scale of Development (retail – Class A1 to A5)	Small scale – up to 500 sq m gross at ground floor level. The site could accommodate a parade of up to five small shops units linking the Lortemore Place East Car Park with Abbey Walk, through to Church Street. Residential or office uses could be provided on upper floors.
Commercial Potential	Secondary site with limited road frontage. However, the existing pedestrian linkage through Abbey Walk and footfall from the public car parks could make some commercial uses viable. The site would only have potential to attract small independent retailers.
Development Constraints	<p>Some development constraints - within conservation area and within the setting of nearby listed buildings (King John's House), therefore, careful scale, massing and design will be required.</p> <p>The loss of public car parking spaces (if not replaced on site or elsewhere) may be undesirable.</p> <p>There is a small stream on the east edge of the site.</p> <p>The impact on the amenity of residential properties on Portesbridge Street would need to be considered and may restrict the density and footprint of development acceptable.</p>
Alternative uses	Retention of existing public car park use may be preferred use for this site.
Access	Existing access from Lortemore Place and pedestrian access also via Abbey Walk.
Overall Development Prospects	Reasonable (subject to the acceptability of the loss of public car parking)


SITE 4: ROMSEY POST OFFICE AND ROYAL MAIL SORTING OFFICE

Evaluation Criteria	Comment
	<p>The Royal Mail holdings provide a potential development site of about 0.1ha. The site, if surplus to the Royal Mail's requirements, could be development in isolation or with Site 3 (the Lortemore Place car park west). The premises have about a 20 metre frontage on to Church Street.</p>
Availability	Short to medium term – could be available for development subject to the Royal Mails aspirations and the need to relocate existing facilities.
Land Assembly	No land assembly required - the site is in single ownership.
Sequential approach to site selection	Part of the site is within the Primary Shopping Area .
Scale of Development (retail – Class A1 to A5)	Small scale – up to 500 sq m gross at ground floor level. The site could accommodate two relatively large shop units fronting on to Church Street (approximately 10 x 25 metres). Alternatively a courtyard of small shop units could be provided with a pedestrian route from Church Street through to the Lortemore Car Park, similar to the Latimer Walk development now under construction.
Commercial Potential	Prime site with road frontage on to Church Street. It is within the Primary Shopping Area as designated in the Local Plan, and is within close proximity of the Market Place. The site should have good potential to attract high street retailers or small independent shops depending on the nature of development.
Development Constraints	<p>Some development constraints - within conservation area and within the setting of nearby listed buildings (King John's House), therefore, careful scale, massing and design will be required.</p> <p>There is a small stream on the east edge of the site.</p>
Alternative uses	Retail preferred use , but the need to relocate the post office counter may be necessary.
Access	Existing access from Lortemore Place for serving and potential pedestrian routes from front and rear.
Overall Development Prospects	Good (subject to availability)


SITE 5: NEWTON LANE CAR PARK

Evaluation Criteria	Comment
	This surface level public car park provides a potential development site of about 0.3ha. It provides about 70 medium stay car parking spaces.
Availability	Short term – could be immediately available for development, if an alternative site to relocate the public car park is not required.
Land Assembly	No land assembly required - the site is in Council ownership.
Sequential approach to site selection	Edge of centre but immediately adjacent to the Primary Shopping Area.
Scale of Development (retail – Class A1 to A5)	Medium scale – up to 1,000 sq m gross at ground floor level. The site could accommodate a single freestanding retail unit with some limited surface customer car parking, or the potential for under-croft car parking. Alternatively a cluster of up parade of about 8 small shops units located in the centre of the site could be provided. Residential or office uses could be provided on upper floors.
Commercial Potential	Secondary site with limited main road frontage. The site is not visible from the primary shopping area. The commercial attractiveness of the site could be improved if a direct link could be punched through to the Bell Street Frontage.
Development Constraints	Some development constraints - within conservation area and within the setting of listed buildings, therefore, careful scale, massing and design will be required. The loss of public car parking spaces (if not replaced on site or elsewhere) may be undesirable.
Alternative uses	Retention of existing public car park use may be preferred use for this site.
Access	Existing access from Newton Lane.
Overall Development Prospects	Poor


SITE 6: ROMSEY BUS STATION AND BROADWATER ROAD CAR PARK

Evaluation Criteria	Comment
	<p>The bus station area and adjacent public car parks provide a potential development area of about 0.6ha. The site could be development in isolation or with Site 7 (the Aldi car park). The public car parks provide about 85 ultra short and short stay car parking spaces.</p>
Availability	Medium term – could only be developed if an alternative location for the bus station can be found.
Land Assembly	No land assembly required - the site is in Council ownership, but the bus station would need to be relocated.
Sequential approach to site selection	Edge of centre but immediately adjacent to the Primary Shopping Area.
Scale of Development (retail – Class A1 to A5)	Large scale – up to 2,000 sq m gross at ground floor level. The site could accommodate a single or several large format retail units with some limited surface customer car parking, or the potential for under-croft or under-ground car parking. Alternatively two parades of shop units either side of the existing access road, to provide up to 20 shop units with rear servicing could be provided. Residential or office uses could be provided on upper floors.
Commercial Potential	<p>Reasonable site with good visibility from Broadwater Road. It is immediately adjacent to the Primary Shopping Area as designated in the Local Plan, and is within close proximity to the Aldi Car Park.</p> <p>The site should have good potential to attract a mix of large format or small retail units.</p>
Development Constraints	<p>Some development constraints – within conservation area but not in a particularly sensitive location. The cost of relocating the bus station may be prohibitive.</p> <p>Redevelopment would need to maintain rear service access for to shop units fronting on to The Hundred.</p> <p>A stream is located on the west edge of the site.</p> <p>The loss of public car parking spaces (if not replaced on site or elsewhere) may be undesirable.</p> <p>Retention of existing trees may be desirable.</p>
Alternative uses	Retention of existing bus station and public car park use may be preferred use for this site.
Access	Existing access from Broadwater Road.
Overall Development Prospects	Reasonable (subject to alternative Bus Station site)


SITE 7: REAR OF THE HUNDRED

Evaluation Criteria	Comment
	<p>This small site (500 sq m) is occupied by a rear service area for units fronting on to The Hundred. It could be developed to provide enlarged units, or redeveloped with premises on The Hundred to provide a mall of small shops linking The Hundred with the bus station/car park. The site could also be developed in conjunction with Site 6, to provide better linkages with the rest of the town centre.</p>
Availability	Short to medium term – could be available for development subject to the aspirations of landowners.
Land Assembly	Some land assembly required - the site appears to be in several ownerships.
Sequential approach to site selection	Within Primary Shopping Area .
Scale of Development (retail – Class A1 to A5)	Small scale – net increase in retail floorspace is likely to be marginal (perhaps not more than 200 sq m gross) either through the extension of existing shop units or a courtyard of small shop units providing a pedestrian route from the car park through to The Hundred.
Commercial Potential	Prime site – extended units would have road frontage on to The Hundred within the Primary Shopping Area. The site should have good potential to attract high street retailers or small independent shops depending on the nature of development.
Development Constraints	<p>Some development constraints - within conservation area but not in a particularly sensitive location.</p> <p>Land assembly and availability uncertain. Small net increase in commercial floorspace may make development unviable. The loss of rear service space may be undesirable.</p>
Alternative uses	Retention of existing service area.
Access	Existing access from Broadwater Road.
Overall Development Prospects	Reasonable


SITE 8: ALDI CAR PARK

Evaluation Criteria	Comment
	<p>This surface car park provides a potential development site of about 0.4ha. The site could be development in isolation or with Site 6 (the adjacent public car park and the Bus Station area). This car park provides about 110 car parking spaces.</p>
Availability	Long term – unlikely to become available for development unless the Aldi closes or the store is relocated. Aldi are unlikely to sell their car parking to a development.
Land Assembly	No land assembly required - the site is in single ownership.
Sequential approach to site selection	Edge of centre but immediately adjacent to the Primary Shopping Area.
Scale of Development (retail – Class A1 to A5)	Large scale – up to 1,500 sq m gross at ground floor level. The site could accommodate large format retail unit with some limited surface customer car parking.
Commercial Potential	Prime site with excellent good road frontage on to Broadwater Road. It is immediately adjacent to the Primary Shopping Area as designated in the Local Plan. The site if available for development should have good potential to attract a mix of large format or small retail units.
Development Constraints	Major development constraints - within conservation area but not in a particularly sensitive location. The cost of purchasing or relocating the Aldi store may be prohibitive.
Alternative uses	Retention of existing food store car park use may be preferred use for this site.
Access	Existing access from Broadwater Road.
Overall Development Prospects	Poor (due to likely unavailability)


SITE 9: CROSFIELD HALL AND CAR PARK

Evaluation Criteria	Comment
	This community hall and surface car park (112 spaces) could provide a development site of 0.5ha. It could be redeveloped to provide a large format store with surface car parking. The community hall would need to be relocated or provided on upper floors as part of a mixed use development. The site could be developed with the adjacent care home (Site 10) to the east or part of the residential estate to the west (Site 11).
Availability	Medium term – could be available for development subject to the relocation of the Hall.
Land Assembly	No land assembly required - the site is in Council ownership.
Sequential approach to site selection	Edge of centre – about 50 metres from the Primary Shopping Area (Dukes Mill Centre).
Scale of Development (retail – Class A1 to A5)	Large scale – up to 1,500 sq m gross at ground floor level. The site could accommodate large format retail unit(s) with approximately 100-150 surface customer car parking spaces, or could provide up to 2,000 sq m gross at ground floor for traditional high street shops with surface car parking (up to 100 spaces). The site could be developed with Site 10 to provide a site of 0.8ha, which could accommodate a large scale development of up to 3,000 sq m gross at ground floor level, with up to 250 surface car parking spaces. Alternatively, part of Site 11 could be assembled to provide up to 4,000 sq m gross of retail at ground floor level, with 300 or more car parking spaces.
Commercial Potential	Prime site with excellent good road frontage on to Broadwater Road. If available for development should have good potential to attract a large format retail unit.
Development Constraints	Some development constraints – adjacent to conservation area but not in a particularly sensitive location. The loss of 112 public car parking spaces (if not replaced on site or elsewhere) may be undesirable. The cost of relocating or providing the community hall on upper floors could affect the viability of development.
Alternative uses	Retention of existing community hall and public car park. Alternatively residential, leisure or office development could be promoted.
Access	Existing access from Broadwater Road.
Overall Development Prospects	Good (subject to Hall relocation)


SITE 10: EDWINA MOUNTBATTEN HOUSE

Evaluation Criteria	Comment
	<p>The care home occupies a site of about 0.3ha. If available for redevelopment it could provide a large format store with surface car parking. The redevelopment prospects may be greater if the site is redeveloped along with the adjacent site to the west (Site 9).</p>
Availability	Medium to long term – could be available for development subject to the memorial trusts aspirations and the need to relocate existing facilities.
Land Assembly	No land assembly required - the site is in single ownership.
Sequential approach to site selection	Edge of centre – about 100 -150 metres from the Primary Shopping Area, along Palmerston Street or Broadwater Road.
Scale of Development (retail – Class A1 to A5)	Medium scale – up to 1,000 sq m gross at ground floor level. The site could accommodate large format retail unit with some limited surface customer car parking.
Commercial Potential	Prime site with excellent good road frontage on to Broadwater Road. If available for development should have good potential to attract a large format retail unit.
Development Constraints	<p>Some development constraints - within conservation area and within the setting of listed buildings, therefore, careful scale, massing and design will be required.</p> <p>Availability uncertain. Cost of acquiring/relocating the care home may make redevelopment unviable. Development with the adjacent Cosfield Hall site is more likely to be viable.</p>
Alternative uses	Retention of existing care home. Alternatively residential, leisure or office development could be promoted.
Access	New access can be provided from Broadwater Road.
Overall Development Prospects	<p>Poor (development in isolation)</p> <p>Reasonable (developed with adjacent site)</p>

SITE 11: BROADWATER ROAD/BANNING STREET RESIDENTIAL AREA

Evaluation Criteria	Comment
	<p>This residential area (about 120 units) if redeveloped could provide a site of up to 1.9 ha. High density development would be required in order to provide a viable scheme.</p> <p>The eastern part of the site (i.e. Paimpol Place – 24 dwellings and possibly Mount Pleasant – 18 dwellings) could be developed along with Crosfield Hall to provide a development site of about one hectare, which could accommodate a large format of about 3,000 sq m gross, with customer car parking, or traditional high street shop units of up to 4,000 sq m gross. Replacement residential units would need to be provided on upper floors.</p>
Availability	Long term – land assembly and major redevelopment is likely to take a considerable period of time.
Land Assembly	Major land assembly required – residential units likely to be in multiple ownerships, but one landowner has a majority holding. CPO may be required to assemble other ownerships.
Sequential approach to site selection	Edge of centre – but opposite the Primary Shopping Area (Dukes Mill Centre).
Scale of Development (retail – Class A1 to A5)	Large scale – high density mixed use development with up to 6,000 sq m gross of retail space at ground floor level. The site could accommodate large format retail units (such as a food superstore or retail warehouses) with significant surface/or decked customer car parking. Decked car parking could be viable if high density development was provided e.g. residential uses on upper floors. The eastern part of the site could be developed along with Site 9.
Commercial Potential	Reasonable site with road frontage on to Broadwater Road. If available for development should have reasonable potential to attract a mix of large format retail units.
Development Constraints	Some development constraints - Land assembly may be difficult with multiple ownerships. Cost of acquiring up to 120 residential units may make redevelopment unviable. There is a listed building in the middle of the site on Banning Street.
Alternative uses	Retention of existing residential units.
Access	Existing access from Broadwater Road.
Overall Development Prospects	<p>Poor (due to potentially complex land assembly).</p> <p>Reasonable (if part developed with Site 9)</p>


SITE 12: ALMA ROAD CAR PARK

Evaluation Criteria	Comment
	<p>This public surface car park provides just over 200 spaces. It could provide a potential development site of about 0.5ha.</p>
Availability	Short term – could be immediately available for development, if an alternative site to relocate the public car park is not required.
Land Assembly	No land assembly required - the site is in Council ownership.
Sequential approach to site selection	Edge of centre – about 50 metres from the Primary Shopping Area (Waitrose).
Scale of Development (retail – Class A1 to A5)	Large scale – up to 2,000 sq m gross at ground floor level. The site could accommodate large format retail unit with surface customer car parking 100 spaces or alternatively more car parking could be provided if decked or under-croft parking was provided. Alternatively a parade of smaller units could be provided with surface or decked car parking. Residential or office uses could be provided on upper floors.
Commercial Potential	Reasonable site with limited road frontage, but the site's location adjacent to the Waitrose store and car park should have reasonable potential to attract a large format retail unit or traditional unit shops.
Development Constraints	<p>Some development constraints – decked or under-croft car parking would probably need to be provided in order to replace existing spaces and new provision for the proposed retail use, which will increase development costs.</p> <p>The loss of public car parking spaces (if not replaced on site or elsewhere) may be undesirable.</p>
Alternative uses	Retention of existing public car park use may be preferred use for this site.
Access	Existing access from Alma Road.
Overall Development Prospects	Reasonable

SITE 13: LOVE LANE

Evaluation Criteria	Comment
	<p>This 0.3 ha area is located to the rear of shop premises on Latimer Street. It is occupied by retail units in Victoria Place, residential properties on Love Lane and a two-storey office development to the rear. High density development would be required in order to provide a viable scheme, perhaps with direct access through to Latimer Street and the adjacent Waitrose store to the north.</p>
Availability	Medium to Long term – land assembly and redevelopment is likely to take time.
Land Assembly	Land assembly required – site in multiple ownership, i.e. a number of residential units, employment uses and shop premises.
Sequential approach to site selection	Part within Primary Shopping Area .
Scale of Development (retail – Class A1 to A5)	Large scale – up to 1,500 sq m gross at ground floor level. The site could accommodate a mall of shops (15-20) units linking Latimer Street through to the Waitrose store. Residential or office uses could be provided on upper floors.
Commercial Potential	Prime site - there is potential to link the development to Latimer street to the west and/ or the Waitrose store to the north, which would make this a prime site. It is immediately adjacent to the Primary Shopping Area as designated in the Local Plan. The site should have good potential to attract small retail units.
Development Constraints	<p>Some development constraints – part within conservation area but not in a particularly sensitive location.</p> <p>Land assembly may be difficult with multiple ownerships. Cost of acquiring existing uses may make redevelopment unviable.</p>
Alternative uses	Retention of existing retail, residential and employment uses may be preferred.
Access	New access can be provided from Love Lane for servicing. Pedestrian links from Latimer Street and or the Waitrose store could be provided.
Overall Development Prospects	Reasonable (subject to land assembly)

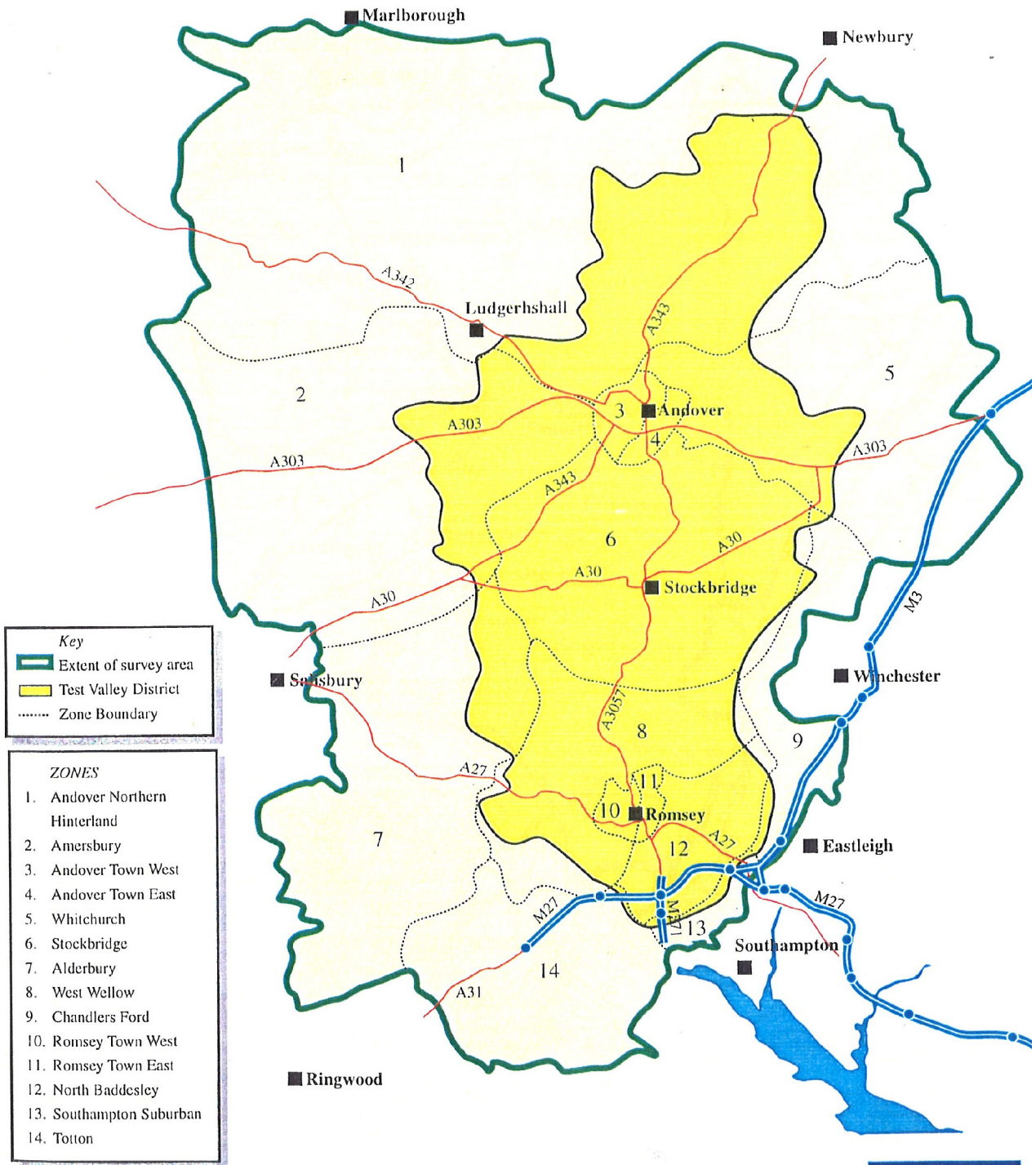
SITE 14: ROMSEY BYPASS AND ROMSEY FOOTBALL CLUB

Evaluation Criteria	Comment
	<p>This 6 ha site is currently occupied by Romsey football ground (1.6ha), green open space (3.9 ha) and six semi-detached houses on Burma Road (0.5ha).</p> <p>Part of the site could accommodate a large food superstore and a large retail warehouse park.</p>
Availability	<p>Short term – a significant part of the site appears immediately available for development. Development of the Romsey football ground will require relocation. Development of Burma Road dwellings may only be possible in the medium term due to land assembly.</p>
Land Assembly	<p>No land assembly required – most part of the site are in single ownership.</p> <p>However, acquisition of six residential units would be required in order to develop the part of the site closest to the town centre.</p>
Sequential approach to site selection	<p>Predominantly out-of-centre – most of the site is over 300 metres from the primary shopping area. The site is also not visible from the town centre and pedestrian linkages are relatively poor. The nearest part of the site (occupied by the residential units) is about 250 metres from the primary shopping area, and development in this area could arguably be considered to be edge-of-centre.</p>
Scale of Development (retail – Class A1 to A5)	<p>Large scale – the total site area could accommodate between 15,000 to 20,000 sq m gross of large format retail premises with surface car parking. This could comprise a large food superstore of about 5,000 sq m gross and a retail warehouse park of 10,000 sq m gross.</p>
Commercial Potential	<p>Prime site with excellent good road frontage on to the Romsey bypass. The football ground area would be the most commercially attractive and prominent site with frontages on the bypass and roundabout. However, this area is the furthest from the town centre.</p>
Development Constraints	<p>Major development constraints - The site is designated as countryside within the local plan (Policy SET03) which allows only development essential in the countryside, or if there is a clear justification for an exception to the general policy constraint. Impact on the open countryside and adjacent historic park/garden would need to be addressed.</p>
Alternative uses	<p>Retention of existing uses – football ground, open land and residential units. Alternatively major residential development could be promoted.</p>
Access	<p>New access can be provided from Romsey Bypass.</p>
Overall Development Prospects	<p>Poor (if no justification for exception to countryside policy constraint)</p> <p>Reasonable (subject to compliance with the sequential approach and acceptable impact on the town centre)</p>

Appendix B

Evaluation of Food Store Development Scenarios

TEST VALLEY ZONE MAP



TEST VALLEY
BOROUGH COUNCIL

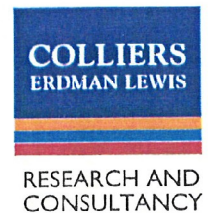


Table 1B: Convenience Shopping Penetration Rates (without food store development in Romsey)

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%	33%	6%	41%	31%	8%	4%
Stockbridge	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%	0%	0%
Local Centres/Shops	1%	2%	1%	4%	1%	1%	1%	2%	0%	2%	1%	0%	0%
District Total	20%	30%	95%	96%	58%	88%	6%	38%	11%	43%	32%	8%	4%
Outside District	80%	70%	5%	4%	42%	12%	94%	62%	89%	57%	68%	92%	96%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 2B: Trade Draw of Food Store Development Scenarios

Scenario	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
Supermarket (1,200 sq m net)	0% £0.00	0% £0.00	0% £0.00	0% £0.00	0% £0.00	1% £0.12	3% £0.36	15% £1.80	9% £1.08	45% £5.40	15% £1.80	10% £1.20	2% £0.24	100% £12.00
Food store (2,000 sq m net)	0% £0.00	0% £0.00	0% £0.00	0% £0.00	0% £0.00	2% £0.48	5% £1.20	15% £3.60	15% £3.60	30% £7.20	15% £3.60	15% £3.60	3% £0.72	100% £24.00
Superstoret (2,500 sq m net)	0% £0.00	0% £0.00	0% £0.00	0% £0.00	0% £0.00	3% £0.90	6% £1.80	15% £4.50	15% £4.50	27% £8.10	15% £4.50	15% £4.50	4% £1.20	100% £30.00

Table 3B: Convenience Expenditure 2011 £Million (without food store development 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	Total
Expenditure 2011	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40
Andover	£13.26	£17.03	£29.67	£27.88	£19.45	£17.99	£0.00	£0.52	£3.99	£0.00	£0.00	£0.00	£0.00	£129.79
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£1.83	£5.70	£4.79	£11.16	£4.00	£6.86	£1.25	£36.27
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38
Local Centres/Shops	£0.70	£1.22	£0.32	£1.21	£0.34	£0.23	£0.37	£0.35	£0.00	£0.54	£0.13	£0.00	£0.00	£5.40
District Total	£13.96	£18.24	£29.99	£29.09	£19.79	£20.30	£2.19	£6.56	£8.78	£11.70	£4.12	£6.86	£1.25	£172.85
Outside District	£55.85	£42.56	£1.58	£1.21	£14.33	£2.77	£34.38	£10.71	£71.05	£15.51	£8.77	£78.92	£29.91	£367.55
Total	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40

Table 4B: Convenience Expenditure 2016 £Million (without food store development 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	Total
Expenditure 2016	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79
Andover	£14.03	£18.28	£30.37	£30.57	£20.74	£17.81	£0.00	£0.57	£4.38	£0.00	£0.00	£0.00	£0.00	£136.75
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£1.93	£6.25	£5.25	£12.71	£4.26	£7.21	£1.28	£39.58
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37
Local Centres/Shops	£0.74	£1.31	£0.32	£1.33	£0.36	£0.23	£0.39	£0.38	£0.00	£0.62	£0.14	£0.00	£0.00	£5.81
District Total	£14.77	£19.58	£30.69	£31.90	£21.10	£20.10	£2.31	£7.20	£9.63	£13.33	£4.40	£7.21	£1.28	£183.51
Outside District	£59.06	£45.69	£1.62	£1.33	£15.28	£2.74	£36.21	£11.74	£77.94	£17.68	£9.34	£82.91	£30.74	£392.29
Market Share Total	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79

Table 5B: Convenience Expenditure 2011 £Million (with 1,200 sq m net food store 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	Total
Expenditure 2011	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.36	£1.80	£1.08	£5.40	£1.80	£1.20	£0.24	£12.00
Andover	£13.26	£17.03	£29.67	£27.88	£19.45	£17.91	£0.00	£0.50	£3.96	£0.00	£0.00	£0.00	£0.00	£129.66
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£1.74	£4.33	£4.48	£6.75	£2.66	£6.44	£1.20	£28.27
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38
Local Centres/Shops	£0.70	£1.22	£0.32	£1.21	£0.34	£0.23	£0.37	£0.34	£0.00	£0.54	£0.13	£0.00	£0.00	£5.38
District Total	£13.96	£18.24	£29.99	£29.09	£19.79	£20.31	£2.46	£6.98	£9.52	£12.68	£4.59	£7.64	£1.44	£176.69
Outside District	£55.85	£42.56	£1.58	£1.21	£14.33	£2.75	£34.11	£10.30	£70.32	£14.53	£8.30	£78.14	£29.72	£363.71
Total	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40

Table 6B: Convenience Expenditure 2011 £Million (with 2,000 sq m net food store 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	Total
Expenditure 2011	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£1.20	£3.60	£3.60	£7.20	£3.60	£3.60	£0.72	£24.00
Andover	£13.26	£17.03	£29.67	£27.88	£19.45	£17.68	£0.00	£0.48	£3.89	£0.00	£0.00	£0.00	£0.00	£129.34
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.61	£1.60	£3.19	£3.98	£5.67	£1.58	£5.85	£1.13	£23.61
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37
Local Centres/Shops	£0.70	£1.22	£0.32	£1.21	£0.34	£0.23	£0.36	£0.34	£0.00	£0.53	£0.13	£0.00	£0.00	£5.37
District Total	£13.96	£18.24	£29.99	£29.09	£19.79	£20.37	£3.16	£7.61	£11.46	£13.40	£5.30	£9.45	£1.85	£183.68
Outside District	£55.85	£42.56	£1.58	£1.21	£14.33	£2.70	£33.42	£9.66	£68.37	£13.82	£7.59	£76.33	£29.31	£356.72
Total	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40

Table 7B: Convenience Expenditure 2011 £Million (with 2,500 sq m net food store 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	Total
Expenditure 2011	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.90	£1.80	£4.50	£4.50	£8.10	£4.50	£4.50	£1.20	£30.00
Andover	£13.26	£17.03	£29.67	£27.88	£19.45	£17.38	£0.00	£0.47	£3.86	£0.00	£0.00	£0.00	£0.00	£129.00
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£1.54	£2.79	£3.94	£5.33	£1.21	£5.79	£1.09	£22.26
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.36
Local Centres/Shops	£0.70	£1.22	£0.32	£1.21	£0.34	£0.23	£0.36	£0.34	£0.00	£0.53	£0.12	£0.00	£0.00	£5.37
District Total	£13.96	£18.24	£29.99	£29.09	£19.79	£20.44	£3.70	£8.09	£12.30	£13.96	£5.83	£10.29	£2.29	£187.99
Outside District	£55.85	£42.56	£1.58	£1.21	£14.33	£2.63	£32.87	£9.18	£67.53	£13.25	£7.06	£75.49	£28.87	£352.41
Total	£69.81	£60.80	£31.57	£30.31	£34.12	£23.06	£36.58	£17.28	£79.83	£27.21	£12.89	£85.78	£31.16	£540.40

Table 8B: Convenience Expenditure 2016 £Million (with 1,200 sq m net food store 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	Total
Expenditure 2016	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.37	£1.83	£1.10	£5.48	£1.83	£1.22	£0.24	£12.18
Andover	£14.03	£18.28	£30.37	£30.57	£20.74	£17.73	£0.00	£0.55	£4.34	£0.00	£0.00	£0.00	£0.00	£136.61
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£1.84	£4.86	£4.94	£8.24	£2.91	£6.78	£1.23	£31.46
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37
Local Centres/Shops	£0.74	£1.31	£0.32	£1.33	£0.36	£0.23	£0.38	£0.38	£0.00	£0.61	£0.14	£0.00	£0.00	£5.80
District Total	£14.77	£19.58	£30.69	£31.90	£21.10	£20.11	£2.59	£7.62	£10.38	£14.33	£4.87	£8.00	£1.47	£187.41
Outside District	£59.06	£45.69	£1.62	£1.33	£15.28	£2.73	£35.94	£11.33	£77.19	£16.68	£8.87	£82.12	£30.54	£388.38
Total	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79

Table 9B: Convenience Expenditure 2016 £Million (with 2,000 sq m net food store 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	Total
Expenditure 2016	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.49	£1.22	£3.65	£3.65	£7.31	£3.65	£3.65	£0.73	£24.36
Andover	£14.03	£18.28	£30.37	£30.57	£20.74	£17.49	£0.00	£0.53	£4.27	£0.00	£0.00	£0.00	£0.00	£136.28
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.61	£1.69	£3.70	£4.43	£7.14	£1.80	£6.18	£1.17	£26.72
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35
Local Centres/Shops	£0.74	£1.31	£0.32	£1.33	£0.36	£0.23	£0.38	£0.37	£0.00	£0.61	£0.13	£0.00	£0.00	£5.78
District Total	£14.77	£19.58	£30.69	£31.90	£21.10	£20.17	£3.29	£8.26	£12.35	£15.06	£5.59	£9.84	£1.90	£194.50
Outside District	£59.06	£45.69	£1.62	£1.33	£15.28	£2.67	£35.23	£10.68	£75.22	£15.95	£8.15	£80.29	£30.12	£381.29
Total	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79

Table 10B: Convenience Expenditure 2016 £Million (with 2,500 sq m net food store 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	Total
Expenditure 2016	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79
New store in Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.91	£1.83	£4.57	£4.57	£8.22	£4.57	£4.57	£1.22	£30.45
Andover	£14.03	£18.28	£30.37	£30.57	£20.74	£17.19	£0.00	£0.52	£4.24	£0.00	£0.00	£0.00	£0.00	£135.95
Romsey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.56	£1.63	£3.29	£4.39	£6.80	£1.43	£6.12	£1.12	£25.35
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35
Local Centres/Shops	£0.74	£1.31	£0.32	£1.33	£0.36	£0.23	£0.38	£0.37	£0.00	£0.61	£0.13	£0.00	£0.00	£5.78
District Total	£14.77	£19.58	£30.69	£31.90	£21.10	£20.24	£3.84	£8.75	£13.20	£15.63	£6.13	£10.69	£2.34	£198.87
Outside District	£59.06	£45.69	£1.62	£1.33	£15.28	£2.60	£34.68	£10.19	£74.37	£15.38	£7.61	£79.43	£29.68	£376.92
Total	£73.83	£65.28	£32.31	£33.23	£36.39	£22.84	£38.52	£18.94	£87.57	£31.01	£13.74	£90.12	£32.02	£575.79

Table 11B: Summary of Food Store Impact (£Million)

	2011 No Food Store	2011 With Food Store	2016 No Food Store	2016 With Food Store	Impact 2011	Impact 2016
Scenario 1 - 1,200 sq m net store						
New food store in Romsey	n/a	£12.00	n/a	£12.18	n/a	n/a
Andover	£129.79	£129.66	£136.75	£136.61	0.1%	0.1%
Romsey	£36.27	£28.27	£39.58	£31.46	22.1%	20.5%
Stockbridge	£1.38	£1.38	£1.37	£1.37	0.3%	0.3%
Local Centres/Shops	£5.40	£5.38	£5.81	£5.80	0.3%	0.3%
Total	£172.85	£176.69	£183.51	£175.23		
Scenario 2 - 2,000 sq m net store						
New food store in Romsey	n/a	£24.00	n/a	£24.36	n/a	n/a
Andover	£129.79	£129.34	£136.75	£136.28	0.4%	0.3%
Romsey	£36.27	£23.61	£39.58	£26.72	34.9%	32.5%
Stockbridge	£1.38	£1.37	£1.37	£1.35	1.2%	1.3%
Local Centres/Shops	£5.40	£5.37	£5.81	£5.78	0.5%	0.4%
Total	£172.85	£183.68	£183.51	£170.14		
Scenario 3 - 2,500 sq m net store						
New food store in Romsey	n/a	£30.00	n/a	£30.45	n/a	n/a
Andover	£129.79	£129.00	£136.75	£135.95	0.6%	0.6%
Romsey	£36.27	£22.26	£39.58	£25.35	38.6%	36.0%
Stockbridge	£1.38	£1.36	£1.37	£1.35	1.7%	1.7%
Local Centres/Shops	£5.40	£5.37	£5.81	£5.78	0.6%	0.5%
Total	£172.85	£187.99	£183.51	£168.42		

Sources: Tables 1B to 10B

Table 12B: Summary of Food Store Impact with RSS Housing Development (£Million)

	2011 No Food Store	2011 With Food Store	2016 No Food Store	2016 With Food Store	Impact 2011	Impact 2016
Scenario 1 - 1,200 sq m net store						
New food store in Romsey	n/a	£12.00	n/a	£12.18	n/a	n/a
Andover	£140.07	£139.94	£149.67	£149.53	0.1%	0.1%
Romsey	£37.29	£29.29	£42.89	£34.77	21.5%	18.9%
Stockbridge	£1.38	£1.38	£1.37	£1.37	0.3%	0.3%
Local Centres/Shops	£5.72	£5.71	£6.32	£6.30	0.3%	0.2%
Total	£184.47	£188.32	£200.25	£191.97		
Scenario 2 - 2,000 sq m net store						
New food store in Romsey	n/a	£24.00	n/a	£24.36	n/a	n/a
Andover	£140.07	£139.62	£149.67	£149.21	0.3%	0.3%
Romsey	£37.29	£24.62	£42.89	£30.03	34.0%	30.0%
Stockbridge	£1.38	£1.37	£1.37	£1.35	1.2%	1.3%
Local Centres/Shops	£5.72	£5.70	£6.32	£6.29	0.4%	0.4%
Total	£184.47	£195.31	£200.25	£186.89		
Scenario 3 - 2,500 sq m net store						
New food store in Romsey	n/a	£30.00	n/a	£30.45	n/a	n/a
Andover	£140.07	£139.28	£149.67	£148.87	0.6%	0.5%
Romsey	£37.29	£23.28	£42.89	£28.66	37.6%	33.2%
Stockbridge	£1.38	£1.36	£1.37	£1.35	1.7%	1.7%
Local Centres/Shops	£5.72	£5.69	£6.32	£6.29	0.5%	0.5%
Total	£184.47	£199.61	£200.25	£185.17		

Appendix C

Evaluation of Retail Warehouse Development Scenarios

Table 1C: Comparison Shopping Penetration Rates (without retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14
Andover	18%	32%	41%	54%	20%	40%	1%	2%	0%	0%	4%	0%	0%
Romsey	0%	0%	0%	0%	3%	5%	6%	28%	4%	35%	10%	2%	5%
Nursling Estate Retail Park	0%	0%	0%	0%	0%	0%	0%	9%	0%	11%	20%	5%	3%
Stockbridge	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%
District Total	18%	32%	41%	54%	23%	49%	7%	39%	4%	46%	34%	7%	8%
Outside District	82%	68%	59%	46%	77%	51%	93%	61%	96%	54%	66%	93%	92%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 2C: Trade Draw of Retail Warehouse Development Scenarios

Scenario	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
4,000 sq m gross	0% £0.00	0% £0.00	0% £0.00	0% £0.00	4% £0.34	4% £0.34	8% £0.68	18% £1.53	13% £1.11	37% £3.15	5% £0.43	6% £0.51	5% £0.43	100% £8.50
6,000 sq m gross	0% £0.00	0% £0.00	0% £0.00	0% £0.00	4% £0.51	5% £0.64	9% £1.15	16% £2.04	13% £1.66	34% £4.34	6% £0.77	7% £0.89	6% £0.77	100% £12.75
8,000 sq m gross	0% £0.00	0% £0.00	0% £0.00	0% £0.00	4% £0.68	5% £0.85	10% £1.70	15% £2.55	14% £2.38	30% £5.10	7% £1.19	8% £1.36	7% £1.19	100% £17.00

Table 3C: Comparison Expenditure 2011 (no retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2011	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92
Andover	£25.55	£42.02	£29.00	£35.03	£14.53	£19.50	£0.74	£0.71	£0.00	£0.00	£1.11	£0.00	£0.00	£168.18
Romsey	£0.00	£0.00	£0.00	£0.00	£2.18	£2.44	£4.44	£9.93	£7.24	£21.18	£2.78	£3.59	£3.37	£57.14
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.19	£0.00	£6.66	£5.55	£8.98	£2.02	£26.41
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95
District Total	£25.55	£42.02	£29.00	£35.03	£16.71	£23.88	£5.18	£13.83	£7.24	£27.84	£9.44	£12.57	£5.40	£253.68
Outside District	£116.40	£89.29	£41.73	£29.84	£55.95	£24.86	£68.76	£21.63	£173.68	£32.68	£18.33	£167.05	£62.06	£902.24
Total	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92

Table 4C: Comparison Expenditure 2016 (no retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2016	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65
Andover	£30.56	£51.04	£33.57	£43.44	£17.52	£21.84	£0.88	£0.88	£0.00	£0.00	£1.34	£0.00	£0.00	£201.07
Romsey	£0.00	£0.00	£0.00	£0.00	£2.63	£2.73	£5.28	£12.31	£8.98	£27.32	£3.35	£4.27	£3.92	£70.79
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.96	£0.00	£8.59	£6.70	£10.67	£2.35	£32.26
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18
District Total	£30.56	£51.04	£33.57	£43.44	£20.15	£26.75	£6.16	£17.15	£8.98	£35.90	£11.38	£14.94	£6.27	£306.31
Outside District	£139.23	£108.46	£48.30	£37.01	£67.46	£27.85	£81.88	£26.83	£215.44	£42.15	£22.10	£198.49	£72.15	£1,087.34
Total	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65

Table 5C: Comparison Expenditure 2011 (with 4,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2011	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.34	£0.34	£0.68	£1.53	£1.11	£3.15	£0.43	£0.51	£0.43	£8.50
Andover	£25.55	£42.02	£29.00	£35.03	£14.45	£19.34	£0.73	£0.68	£0.00	£0.00	£1.10	£0.00	£0.00	£167.90
Romsey	£0.00	£0.00	£0.00	£0.00	£2.16	£2.40	£4.34	£9.22	£7.13	£19.52	£2.70	£3.57	£3.32	£54.35
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.97	£0.00	£6.13	£5.40	£8.92	£1.99	£25.42
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95
District Total	£25.55	£42.02	£29.00	£35.03	£16.95	£24.03	£5.75	£14.40	£8.23	£28.80	£9.63	£13.00	£5.74	£258.12
Outside District	£116.40	£89.29	£41.73	£29.84	£55.71	£24.71	£68.18	£21.05	£172.69	£31.72	£18.14	£166.63	£61.71	£897.80
Total	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92

Table 6C: Comparison Expenditure 2011 (with 6,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2011	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.51	£0.64	£1.15	£2.04	£1.66	£4.34	£0.77	£0.89	£0.77	£12.75
Andover	£25.55	£42.02	£29.00	£35.03	£14.40	£19.19	£0.72	£0.67	£0.00	£0.00	£1.08	£0.00	£0.00	£167.65
Romsey	£0.00	£0.00	£0.00	£0.00	£2.15	£2.38	£4.29	£9.04	£7.09	£18.98	£2.65	£3.55	£3.29	£53.41
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.91	£0.00	£5.97	£5.30	£8.89	£1.97	£25.03
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95
District Total	£25.55	£42.02	£29.00	£35.03	£17.06	£24.15	£6.16	£14.65	£8.75	£29.28	£9.80	£13.33	£6.03	£260.80
Outside District	£116.40	£89.29	£41.73	£29.84	£55.60	£24.59	£67.77	£20.81	£172.17	£31.24	£17.97	£166.30	£61.42	£895.12
Total	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92

Table 7C: Comparison Expenditure 2011 (with 8,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2011	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.68	£0.85	£1.70	£2.55	£2.38	£5.10	£1.19	£1.36	£1.19	£17.00
Andover	£25.55	£42.02	£29.00	£35.03	£14.36	£19.09	£0.72	£0.66	£0.00	£0.00	£1.06	£0.00	£0.00	£167.47
Romsey	£0.00	£0.00	£0.00	£0.00	£2.14	£2.36	£4.23	£8.84	£7.04	£18.64	£2.59	£3.54	£3.25	£52.62
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.84	£0.00	£5.86	£5.17	£8.84	£1.95	£24.67
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.95
District Total	£25.55	£42.02	£29.00	£35.03	£17.18	£24.24	£6.64	£14.89	£9.42	£29.60	£10.01	£13.74	£6.39	£263.70
Outside District	£116.40	£89.29	£41.73	£29.84	£55.48	£24.50	£67.29	£20.56	£171.50	£30.92	£17.76	£165.89	£61.06	£892.21
Total	£141.95	£131.30	£70.73	£64.86	£72.66	£48.74	£73.93	£35.46	£180.92	£60.52	£27.77	£179.63	£67.45	£1,155.92

Table 8C: Comparison Expenditure 2016 (with 4,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2016	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.37	£0.37	£0.73	£1.65	£1.19	£3.39	£0.46	£0.55	£0.46	£9.16
Andover	£30.56	£51.04	£33.57	£43.44	£17.44	£21.67	£0.87	£0.85	£0.00	£0.00	£1.32	£0.00	£0.00	£200.77
Romsey	£0.00	£0.00	£0.00	£0.00	£2.60	£2.69	£5.18	£11.56	£8.86	£25.53	£3.27	£4.24	£3.87	£67.78
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.71	£0.00	£8.02	£6.54	£10.61	£2.32	£31.20
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18
District Total	£30.56	£51.04	£33.57	£43.44	£20.40	£26.91	£6.78	£17.77	£10.05	£36.94	£11.58	£15.40	£6.65	£311.09
Outside District	£139.23	£108.46	£48.30	£37.01	£67.21	£27.69	£81.27	£26.21	£214.37	£41.11	£21.90	£198.03	£71.78	£1,082.56
Total	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65

Table 9C: Comparison Expenditure 2016 (with 6,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2016	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.55	£0.69	£1.24	£2.20	£1.79	£4.67	£0.82	£0.96	£0.82	£13.74
Andover	£30.56	£51.04	£33.57	£43.44	£17.38	£21.51	£0.86	£0.84	£0.00	£0.00	£1.31	£0.00	£0.00	£200.51
Romsey	£0.00	£0.00	£0.00	£0.00	£2.59	£2.66	£5.12	£11.35	£8.82	£24.95	£3.21	£4.23	£3.83	£66.77
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.65	£0.00	£7.84	£6.42	£10.57	£2.30	£30.78
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18
District Total	£30.56	£51.04	£33.57	£43.44	£20.52	£27.04	£7.22	£18.04	£10.60	£37.46	£11.77	£15.76	£6.96	£313.98
Outside District	£139.23	£108.46	£48.30	£37.01	£67.09	£27.56	£80.82	£25.94	£213.81	£40.59	£21.72	£197.67	£71.47	£1,079.67
Total	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65

Table 10C: Comparison Expenditure 2016 (with 8,000 retail warehouse development)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10&12	Zone 12	Zone 13	Zone 14	Total
Expenditure 2016	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65
Retail warehouses in Romsey	£0.00	£0.00	£0.00	£0.00	£0.73	£0.92	£1.83	£2.75	£2.56	£5.49	£1.28	£1.47	£1.28	£18.31
Andover	£30.56	£51.04	£33.57	£43.44	£17.33	£21.40	£0.86	£0.83	£0.00	£0.00	£1.29	£0.00	£0.00	£200.31
Romsey	£0.00	£0.00	£0.00	£0.00	£2.59	£2.65	£5.06	£11.14	£8.76	£24.58	£3.14	£4.21	£3.79	£65.91
Nursling Estate Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.58	£0.00	£7.73	£6.29	£10.52	£2.27	£30.39
Stockbridge	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.18
District Total	£30.56	£51.04	£33.57	£43.44	£20.65	£27.14	£7.74	£18.30	£11.32	£37.80	£12.00	£16.20	£7.35	£317.11
Outside District	£139.23	£108.46	£48.30	£37.01	£66.96	£27.46	£80.30	£25.68	£213.09	£40.25	£21.49	£197.23	£71.07	£1,076.54
Total	£169.79	£159.50	£81.87	£80.45	£87.61	£54.60	£88.05	£43.98	£224.42	£78.05	£33.48	£213.43	£78.42	£1,393.65

Table 11C: Summary of Retail Warehouse Impact (£Millions)

	2011 Without	2011 With	2016 Without	2016 With	Impact 2011
Scenario 1 - 4,000 sq m gross					
New retail warehouses in Romsey	n/a	£8.50	n/a	£9.16	n/a
Andover	£168.18	£167.90	£201.07	£200.77	0.2%
Romsey	£57.14	£54.35	£70.79	£67.78	4.9%
Nursling Retail Park	£26.41	£25.42	£32.26	£31.20	3.7%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.1%
Total	£253.68	£258.12	£306.31	£311.09	
Scenario 2 - 6,000 sq m gross					
New retail warehouses in Romsey	n/a	£12.75	n/a	£13.74	n/a
Andover	£168.18	£167.65	£201.07	£200.51	0.3%
Romsey	£57.14	£53.41	£70.79	£66.77	6.5%
Nursling Retail Park	£26.41	£25.03	£32.26	£30.78	5.2%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.1%
Total	£253.68	£260.80	£306.31	£313.98	£0.12
Scenario 3 - 8,000 sq m gross					
New retail warehouses in Romsey	n/a	£17.00	n/a	£18.31	n/a
Andover	£168.18	£167.47	£201.07	£200.31	0.4%
Romsey	£57.14	£52.62	£70.79	£65.91	7.9%
Nursling Retail Park	£26.41	£24.67	£32.26	£30.39	6.6%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.2%
Total	£253.68	£263.70	£306.31	£317.11	

Sources:

Tables 1C to 10C

Table 12C: Summary of Retail Warehouse Impact with RSS Housing Development (£Millions)

	2011 Without	2011 With	2016 Without	2016 With	Impact 2011
Scenario 1 - 4,000 sq m gross					
New retail warehouses in Romsey	n/a	£8.50	n/a	£9.16	n/a
Andover	£179.65	£179.37	£217.38	£217.08	0.2%
Romsey	£59.08	£56.29	£77.90	£74.90	4.7%
Nursling Retail Park	£27.02	£26.03	£34.50	£33.43	3.7%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.1%
Total	£267.69	£272.13	£331.96	£336.75	
Scenario 2 - 6,000 sq m gross					
New retail warehouses in Romsey	n/a	£12.75	n/a	£13.74	n/a
Andover	£179.65	£179.12	£217.38	£216.81	0.3%
Romsey	£59.08	£55.35	£77.90	£73.89	6.3%
Nursling Retail Park	£27.02	£25.64	£34.50	£33.02	5.1%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.1%
Total	£267.69	£274.81	£331.96	£339.63	£0.12
Scenario 3 - 8,000 sq m gross					
New retail warehouses in Romsey	n/a	£17.00	n/a	£18.31	n/a
Andover	£179.65	£178.94	£217.38	£216.62	0.4%
Romsey	£59.08	£54.55	£77.90	£73.03	7.7%
Nursling Retail Park	£27.02	£25.27	£34.50	£32.62	6.4%
Stockbridge	£1.95	£1.95	£2.18	£2.18	0.2%
Total	£267.69	£277.72	£331.96	£342.77	

Appendix D

Analysis of Sound Core Strategy DPDs

INTRODUCTION

This appendix sets out a summary analysis of five Core Strategy DPDs that have been successfully declared sound and have been adopted. Local authorities with similar characteristics when compared with Test Valley have been chosen. The analysis examines the nature of the town centre/retail policies contained within the Core Strategy and the evidence base prepared to underpin the Strategy.

In total 22 Core Strategy DPDs have been found sound by the Secretary of State's appointed inspectors, and have been formally adopted. Of these 22 Core Strategies, we consider the most relevant to the context of Test Valley are the following:

- South Hams;
- Bracknell Forest;
- Horsham;
- South Cambridgeshire; and
- Tonbridge and Malling

A summarise of each LPA's approach is as follows:

- South Hams District Council's approach appears to be broad brush with only reference to the hierarchy of Town Centre. More detailed policies on individual settlements will follow in subsequent DPDs.
- Bracknell Forest Borough Council's approach sets out a hierarchy of town centres. The Core Strategy reiterates the retail tests set out in PPS6.
- Horsham District Council's approach does not identify a hierarchy of Town Centres in the Core Strategy, opting to define this through the Development Control Policies DPD Proposals Map. The Core Strategy does set out spatial objectives for the district and town centres. The policies broadly reflect PPS6, but also seek to identify where they will control changes of use within centres.
- South Cambridgeshire District Council's approach identifies a hierarchy of centres and also identifies that there is no further quantitative need for major shopping provision in the district. However the need for development at Northstowe is identified.
- Tonbridge & Malling Borough Council's approach identifies a hierarchy of retail centres and seeks to ensure that proposals will be permitted where they satisfy the tests in PPS6, and where they maintain or enhance vitality and viability of retail centres. The Core Strategy also sets out some broad design objectives/parameters for the Tonbridge Central Area AAP to follow.

SOUTH HAMS DISTRICT COUNCIL

South Hams District Council is the local planning authority for an area of South Devon located between Plymouth and Torquay. Its main town centres include Dartmouth, Ivybridge, Kingsbridge and Totnes. The South Hams Local Development Framework (LDF) Core Strategy Development Plan Document (DPD) was adopted in December 2006.

Core Strategy Approach to Retail and Town Centre Policies

Throughout the South Hams Core Strategy retail and town centre policies appear to form a sub-context to wider strategic objectives relating to the economy and transport and accessibility. Strategic objectives SO16 and SO17 relate to transport and accessibility and seek to “*support the role of market towns, especially the town centres, and other local centres*” and “*retain existing and promote new local services, facilities and amenities*” respectively.

The Core Strategy states that the settlements identified as suitable for development will have a ‘*development boundary*’ defined through the relevant settlement specific DPD. Policy CS1 relates the location of development. It sets out a hierarchy of settlements where, in principle, development is acceptable. This hierarchy sets out a number of Area Centres, Local Centres and Villages. Policy CS1(3) states:

“In Area Centres and at Modbury and Salcombe, Town Centre Zones will be defined to provide a focus for: retail activity; leisure and entertainment facilities; the arts, culture and tourism; commercial and office development; and housing (as part of mixed-use schemes).”

The Town Centre Zones have not been identified in the Core Strategy but will be identified through the relevant settlement’s DPDs. Appendix 1 outlines the monitoring framework for the Core Strategy and sets a target that 90% of all new retail/leisure and entertainment development will be in Town Centre Zones.

Background Documents

The LDF evidence base includes the South Hams Retail Study undertaken in January 2006. This Retail Study informed the retail policies contained within the Core Strategy and will inform the production of further DPDs. The Retail Study includes a qualitative assessment of each of the town centres, which identifies the retail composition, gaps in the retail provision and the vitality and viability of each centre.

The Retail Study does not provide a quantitative based retail capacity assessment but does provide an indication of the scope for retail development based on the vitality and viability of each of the Town Centres and the physical and policy constraints within the Town Centres. The Core Strategy is based on these qualitative health check assessment rather than a quantitative retail capacity assessment.

BRACKNELL FOREST BOROUGH COUNCIL

Bracknell Forest Borough Council in Berkshire includes the major urban area of Bracknell and a number of smaller settlements including Crowthorne and Sandhurst. The Bracknell Forest LDF Core Strategy DPD was adopted in February 2008.

Core Strategy Approach to Retail and Town Centre Policies

The Bracknell Forest Core Strategy sets out a network of retail centres and has specific policies on Town Centre retail and Out-of-Centre retail. Strategic Objective C aims to deliver the regeneration of Bracknell Town Centre. Policy CS3 highlights Bracknell Town Centre as *“serving the comparison and specialist shopping needs of the residential population of the Borough along with a substantial working population within Bracknell Town.”*

The Core Strategy identifies a network of retail centres and highlights that Bracknell Town Centre (including the Peel Centre retail park) will contain the main comparison shopping offer in the Borough. The Core Strategy also identifies Crowthorne and Sandhurst as centres that will contain comparison shopping of an appropriate scale and convenience shopping to serve their local area.

Policies CS21 and CS22 relate specifically to retail. These policies are identified as key delivery drivers for the Strategic Objectives of; supporting and facilitating essential community facilities and infrastructure in accessible locations; and maintaining high and stable levels of economic growth. Policy CS21 relates to retail development in town centres. It generally reiterates national planning policy set out in PPS6 relating to scale, impact, accessibility and where there are no suitable sites for Town Centre the sequential approach to site selection in accordance with Policy CS22 below. It goes on to state that:

“Planning applications involving the loss by redevelopment or change of use of retail units that perform an important community role will only be allowed if they do not conflict with other elements of this strategy.”

Policy CS22 relates to Out of Town Centre development. Again it generally reiterates the requirements of PPS6 relating to demonstrating need, scale, impact, accessibility and the sequential approach to site selection. Further Policy CS22 states that development will not be permitted where there would be unacceptable adverse environmental impacts caused by the development and/or its subsequent operation.

The Core Strategy does not make reference to any retail capacity studies undertaken and therefore does not include any specific guidance as to the scale and specific location of further retail development within the Borough. The Core Strategies approach is very much broad brush and in line with PPS6 policy.

Background Documents

The LDF evidence base does not appear to include any technical studies or background papers on retail. However a topic paper on retail was produced as part of the process and the Core Strategy's retail policies were developed having regard to the Bracknell Town Centre Retail Impact Analysis and Retail Capacity Study and Appendices (2002). The Council's written response to the Inspector's questions suggested that an updated retail evidence base will be required to support more specific retail policies in subsequent DPDs.

HORSHAM DISTRICT COUNCIL

Horsham District Council in West Sussex includes the market town of Horsham and a number of smaller settlements including Southwater, Henfield, Pulborough and Storrington & Sullington. The Horsham LDF Core Strategy DPD was adopted in February 2007 and the Horsham LDF General Development Control Policies DPD was adopted in December 2007.

LDF Approach to Retail and Town Centre Policies

The Horsham Core Strategy sets out a Spatial Objective for the Districts Town Centres stating:

“To enhance the vitality and viability of Horsham town centre and the centres of smaller towns and villages in the District – it is intended to enable their continued evolution and increased diversity through the application of appropriate policies for retail or related development, including terms of the evening economy where applicable.”

Core Strategy Policy CP17 seeks to maintain and enhance the vitality of the centres through promotional and physical improvements as well as measures addressing retail development including: permitting appropriate new retail proposals; limiting proposals within existing town centres to under 2,500 sq m gross floorspace; restricting retail development (except extensions under 200 sq m gross floorspace) outside the defined centres; defining retail frontages for the relevant centres through the General Development Control Policies document; and controlling the change of use from A1 Retail to any other A-Class or residential use at ground floor level within the defined retail frontages.

The approach of the Core Strategy refines national PPS6 policy in light of the local circumstances. The Core Strategy approach is further refined through the General Development Control Policies DPD (December 2007). The proposals map accompanying this document identifies the Primary Shopping Areas and Retail Frontages. Policy DC34 relates to new retail development within the defined town and village centres. It requires that beyond the Core Strategy requirements proposals will be permitted if they: relate and connect well to the Primary Shopping Areas and Retail Frontages; complement the vitality and viability of the centre; and improve the shopping range, quality and function of the retail centre as a whole.

Policy DC35 relates to retail development outside the defined Primary Shopping Areas and Retail Frontages and requires that proposals are subject to the PPS6 tests (need, scale, impact, accessibility and the sequential approach to site selection). Both Policies DC34 and DC35 require a green travel plan to be produced as part of retail proposals.

Policy DC36 seeks to control the change of use from A1 shops in town and village centres to other Class A uses based on amenity and the proliferation of non-shop units in specific frontages. It also seeks to prevent the change of use from Class A uses to residential in these areas unless Class A is not viable. Policies on neighbourhood/village shops, farm shops and garden centres are included.

The Core Strategy identifies retail and other Class A uses as a way of maintaining and enhancing the vitality and viability of their town centres. Retail policies in the Core Strategy and Development Control DPDs support this objective and identify the parameters for development with regard to PPS6.

Background Documents

The LDF evidence base includes The Horsham Retail Health Check Report (February 2003) and The Horsham Retail Health Check Update (July 2005). The latter provides a qualitative and quantitative assessment of retail within Horsham Town Centre. The 2003 document is referred to in the Core Strategy as a reference for the monitoring and implementation framework to ensure the vitality and viability of existing town centres.

SOUTH CAMBRIDGESHIRE DISTRICT COUNCIL

South Cambridgeshire District Council is a rural authority. Its main centres are the villages of Cambourne, Fulbourne, Great Shelford & Stapleford, Histon & Impington and Sawston. Northstowe is a proposed new town north of Cambridge within the District. The South Cambridgeshire LDF Core Strategy DPD was adopted in January 2007 and the South Cambridgeshire Development Control Policies DPD was adopted in July 2007.

LDF Approach to Retail and Town Centre Policies

The South Cambridgeshire Core Strategy sets out a retail hierarchy for the District. Policy ST/9 identifies that the retail hierarchy will be taken into account when assessing the scale of proposals and identifies the four levels of centre, i.e. Northstowe Town Centre; Cambridge East District Centre; Rural Centres and other Village Centres.

The Core Strategy acknowledges that Cambridge is the main centre within the hierarchy. South Cambridgeshire forms the hinterland between Cambridge and market town centres in other authorities. The Core Strategy identifies that there is no need for major shopping provision in the sub-region up to 2016, apart from Northstowe where major convenience and comparison floorspace is required to support a new town centre. This retail floorspace capacity follows on from the provisions in the Cambridgeshire Structure Plan, based on the Retail Study for the sub-region in July 2001. However the Core Strategy highlights that retail proposals will be further dealt within individual AAPs and the Inspector agreed that there was no need for a further retail study to be undertaken for the purposes of the Core Strategy.

Policy SF/2 of The Development Control Policies DPD (July 2007) reiterates the requirements of PPS6 in assessing proposals for new developments not within existing centres or allocated in an AAP. It also contains policies that seek to: prevent the loss of land allocated for other uses to retail development; ensure retail proposals in villages are of an appropriate function and scale; and limit retailing in the countryside to local produce associated with farms/nurseries or convenience goods where there is no impact on village centres.

Background Documents

The LDF bases much of its retail capacity assessments on the provisions within the Cambridgeshire Structure Plan (2003). A sub-regional retail study was undertaken identifying that there is limited scope for new major retail development within the sub-region up to 2016. The sub-regional retail capacity is acknowledged in the South Cambridgeshire LDF.

TONBRIDGE AND MALLING

Tonbridge & Malling Borough Council is in the heart of Kent. Its main centres are Tonbridge, Snodland, West Malling, Hadlow, Borough Green and Aylesford. The Tonbridge & Malling Core Strategy DPD was adopted in September 2007.

LDF Approach to Retail and Town Centre Policies

The Core Strategy includes policies on retail development and Tonbridge Town Centre. Policy CP22 relates to new retail development, which will be permitted where it maintains or enhances the vitality and viability of existing centres and satisfies the retail tests set out in PPS6. The policy suggests development sites will be identified in subsequent DPD. This policy also states that:

“Proposals which might harm the vitality or viability of an existing centre either in terms of retail impact or, in the case of smaller centres, undermining the balance of uses or harming their amenity, will not be permitted.”

The Core Strategy sets out a hierarchy of retail centres identifying the Town Centre, District Centres, Urban Local Retail Centres, Rural Local Retail Centres, New Retail Centres and Out-of-Centre Retail Facilities in the Borough. It also acknowledges in the hierarchy that there are individual local shops within suburban and rural locations.

Policy CP23 provides a broad framework for Tonbridge Town Centre, within which the Tonbridge Central Area AAP will be prepared. The policy aims to ensure a sustainable pattern of development including retail, employment, housing and leisure uses to regenerate and enhance the vitality and viability of the centre. The policy sets out several broad design parameters which the Tonbridge Central Area AAP will need to respond to.

Background Documents

The Core Strategy's retail hierarchy is underpinned by the Tonbridge and Malling Retail Assessment Study – Review of Existing Retail Hierarchy, carried out by Nathaniel Lichfield and Partners in September 2005. This is complemented by the Tonbridge Town Centre Study prepared by NLP in November 2004 which provides a quantitative capacity assessment for retail floorspace in the town centre.

Appendix E

Analysis of Recent Secretary of State Decisions

CASE	DATE	DESCRIPTION OF CASE	DECISION	INTERPRETATION OF PPS6 IN SOS's DECISION				
				NEED	SCALE	IMPACT	SEQUENTIAL	ACCESSIBILITY
Isleworth	30 April 2008	5 shops for sale of Bulky Goods from ground floor of existing office building, formally a car showroom. Out-of-centre.	Dismissed				650m from primary shopping frontage – out of centre. Although the sequential test suggests no alternative sites closer to town centre exist it failed to consider split sites and disaggregation.	Hazard and congestion between delivery vehicles and cars on adjacent road.
Teeside Retail Park, Stockton-on-Tees	16 Apr 2008	Redevelopment of existing health and fitness club to provide 2090 sqm non food bulky goods retail warehouse.	Dismissed				Sequentially preferred sites could become available in a 'reasonable' period.	Although good public transport accessibility, would not reduce the need to travel by car but may encourage linked trips.
Altrincham	09 Apr 2008	Redevelopment of a local centre to provide a 3050 sqm Waitrose, 14 local shops totalling 1433 sqm and residential flats.	Dismissed			Dismissed on the basis that a 90% increase in retail floorspace and a large supermarket would harm the vitality and viability of a nearby district centre. There was no evidence that the scheme would be unviable without the large supermarket.		
Scunthorpe	31 Mar 2008	3,133 sqm non-food retail warehouse. Edge of town centre with extant PP for 1,300 sqm retail warehouse on site.	Allowed			Would represent a 4.2% impact on the town centre turnover, though only 2% if only the increased (uncommitted) floorspace is taken into account, which would not harm vitality or viability of a vulnerable TC.		
Braintree	22 Jan 2008	1,060 sqm Lidl and replacement agricultural merchant showroom and workshop. Out of Centre	Allowed	Whilst no quantitative need was established a qualitative need which would improve customer choice and enhance competition was established.				

CASE	DATE	DESCRIPTION OF CASE	DECISION	INTERPRETATION OF PPS6 IN SOS's DECISION				
				NEED	SCALE	IMPACT	SEQUENTIAL	ACCESSIBILITY
Longbridge, Birmingham	21 Feb 2008	Development of Aldi store on industrial land on edge-of-centre site.	Dismissed			Would be harm to the vitality and viability of a proposed new shopping centre scheme and would prejudice development of a Regional Investment Site contrary to approach set out in an AAP.	Inadequate sequential search. Unacceptable loss of industrial land.	
Hereford	15 Jan 2008	Variation of bulky comparison goods condition to allow occupation of B&Q unit by Next and Argos in out-of-centre retail park.	Dismissed			Harm to vitality and viability of city centre due to prejudicial effect on implementation of regeneration proposals.	Regeneration proposals for retail development in city centre was sequentially preferable site available within a reasonable period stated as by 2012 (4 years)	
Peterhead	14 Jan 2008	4,632 sqm gross retail foodstore nearby existing ASDA supermarket. Out of centre	Dismissed			Although it would compete with 3 nearby foodstores, the cumulative impact on the vitality and viability from 24% reduction in conv goods turnover would harm town centres footfall and retail. The impact of existing out of town convenience retail on the centre had not yet been assessed with recommendation that no further permissions given until this is known.		
Berwick-upon-Tweed	10 Jan 2008	The proposals included a Morrisons' extension, a new Tesco store, a new Asda food store and retail warehousing (proposed by Kensington & Edinburgh (K&E)), and two further retail warehousing schemes (proposed by Kilmartin and Ediston respectively). All out-of-centre.	Granted PP Tesco. Granted PP Morrisons. Refused PP Kilmartin. Dismissed K&E Appeal. Allowed Ediston Appeal.	Weight was given to indicators of qualitative need, in the absence of a clear quantitative capacity. Preference stated for the 'benchmark' approach to assessing retail capacity, though an allowance for growth turnover efficiency of convenience floorspace is not always appropriate.	No specific consideration of scale was given in the inspector's decision.	Identified the most reasonable combination of schemes in terms of impact. Considered the combined impact of schemes would be less than the sum of each due to store competition between each other.	Consideration of qualitative need in the application of sequential approach, particularly in the scope for flexibility and disaggregation.	

CASE	DATE	DESCRIPTION OF CASE	DECISION	INTERPRETATION OF PPS6 IN SOS's DECISION				
				NEED	SCALE	IMPACT	SEQUENTIAL	ACCESSIBILITY
East Kilbride	09 Jan 2008	Pets at Home retail store on out of centre site between two trunk roads and adjacent retail parks	Dismissed			No harm to vitality and viability of town and local centres due to specialised nature of goods.		Location beyond strong road and topographic barrier.
Morpeth	10 Nov 2007	Out of centre 2447 sqm non food bulky goods retail unit for Focus and associated garden centre.	Allowed	SoS noted that quantitative need was to be based on the class of goods to sold (i.e. DIY) although the application was much wider (i.e. Bulky comparison retail)			The format of such stores does not outweigh requirement of flexibility and disaggregation. Even so there were no sequentially preferable sites in this case.	
Southampton	05 Nov 2007	6,907 sqm Sainsbury's and 20 key worker flats/79 flats and health centre. Redevelopment of bus depot, edge of centre.	Dismissed (based on residential amenity)	Quantitative need for comparison proved but not convenience. Qualitative need proved and would increase choice and clawback expenditure leakage.		Would improve vitality and viability		
Tewkesbury	17 Oct 2007	1460 sqm Aldi foodstore out-of-centre residential location.	Dismissed		Proposal would be of a larger scale and massing than any nearby building.		Although a town centre site identified in Development Brief there was no extant PP and it was unlikely to become available in 5 year period.	
Barnstaple	08 Nov 2006	Out-of-centre non-food retail warehouse	Refused	Although it was expected the occupant would be a DIY store, on the whole there was no clear need for the proposal based on comparison goods and the lack of a DIY goods based assessment weighed against it.			Sequentially preferable site which was part of a regeneration area. The proposal may have deterred or delayed development at this sequentially preferable site.	

CASE	DATE	DESCRIPTION OF CASE	DECISION	INTERPRETATION OF PPS6 IN SOS's DECISION				
				NEED	SCALE	IMPACT	SEQUENTIAL	ACCESSIBILITY
Cambridge	05 June 2006	Planning application for existing Argos store but without a condition attached to the implemented planning permission preventing further floorspace through construction of mezzanines, to allow construction of a mezzanine for ancillary storage and staff uses.	Allowed			Inspector highlighted the method of trading for Argos stores is unique and that the additional floorspace would not increase the sales area nor the type and range of goods currently sold, and therefore would not impact upon Cambridge City Centre. A condition requiring the removal of the structure should Argos vacate the premises was deemed appropriate.		
Basingstoke	15 May 2006	Two separate applications. One for a B&Q A1 bulky goods retail warehouse and one for Wickes A1 retail warehouse. Both out-of-centre, neither allocated for retail use	Both allowed	Quantitative and Qualitative need for additional DIY floorspace was demonstrated for both proposed stores.		Inspector stated DIY stores tend to compete with retail warehouses or builders merchants, neither of which are usually in 'centres'. Traditional hardware shops and retailers such as Woolworths would not be in direct competition with either proposal.	No sequentially preferable sites. All of the Town Centre sites examined already made an important contribution to the vitality and viability of the centre (e.g. sites in car park use) and use of these sites for the proposed development would undermine the Town Centre's vitality and viability.	
Scunthorpe	08 Feb 2006	Planning application for existing Tesco store but without a condition attached to the implemented planning permission limiting comparison sales to 25% to allow up to 40% comparison sales floorspace.	Allowed	Unnecessary to demonstrate need in this case because it was a change of condition only and the increase in comparison element from 25% to 40% did not involve the material change in character of the store.				