Nathaniel Lichfield & Partners
Planning. Design. Economics.

Winchester Retail Study

2014 Update Final Report

Winchester Council

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Nathaniel Lichfield & Partners
14 Regent's Wharf
All Saints Street
London N1 9RL

nlpplanning.com

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

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Winchester City Council to prepare a retail and town centre uses study in 2007. This study included:

- an assessment of the future needs for additional retail and commercial leisure facilities within the authority area up to 2026;
- an analysis of the role and function of existing centres in the Winchester City Council's area;
- an assessment of the capacity of Winchester's centres to accommodate growth, and the identification of potential development sites; and
- a policy review and proposed issues and options for the Local Development Framework (LDF).

1.2 In 2010 and 2012, NLP was commissioned to provide updates to the 2007 retail and town centre uses study. Due to recent changes in population and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned to undertake a partial update focusing on the retail floorspace projections, retail frontages and opportunities to accommodate growth. It is not considered necessary to update the findings of previous studies in relation to the household shopper survey results (undertaken in 2012), commercial leisure provisions, the network of centres, centre health checks and centre boundaries, because these remain relatively up to date and the conclusions remain robust.

1.3 This 2013 report provides a further update, identifying recent changes and trends in retail planning, including the National Planning Policy Framework (NPPF) and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. The report also reviews the capacity for Winchester's centres to accommodate growth.

1.4 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Sections 3 sets out the updated retail capacity and quantitative need assessment. Section 4 reassesses the scope for accommodating growth. Section 5 provides the recommendations and conclusions.

2.0 Recent Changes and Trends

2.1 The previous 2012 Update provided projections up to 2031. These projections need to be updated in terms of the latest population, expenditure projections and benchmark turnover figures, and a review of recent retail trends. It is important to consider changes in the retail sector nationally and the implications for Winchester.

Retail Trends

2.2 The economic downturn is still having a significant impact on the sector. A number of national operators have failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessop's, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Argos has recently announced major shop closures.

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

2.4 Assessing future expenditure levels within this study needs to take into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the study period. This study takes a long term view, recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

2.5 An overview of national trends within the retail sector is set out below.

Expenditure Growth

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

2.7 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The economic downturn suggests that past rates of growth are unlikely to be achieved in the short term (next 5 years), but the underlying trend over the medium (5 to 10 years) and long terms (beyond 10 years) is expected to lead to a need for further retail floorspace. These national trends are anticipated to be mirrored in across all parts of Hampshire, including Winchester.

2.8 Within the Winchester study area, expenditure per person on convenience goods has not changed significantly between 2009 and 2012 (source: Experian adjusting for inflation), and there has been limited real growth during the recession. This trend is likely to continue in the short term, but modest growth is expected in the medium and long term, as and when the economy recovers. Most of the growth in this sector is likely to be fuelled by population growth within the study area.

2.9 Comparison goods expenditure per person in the Winchester study area has fallen by about 1% between 2009 and 2012, despite 1.9% inflation during this period. Modest levels of growth are expected in the future, at a lower rate than previous pre-recession trends.

2.10 Low expenditure growth and deflationary pressures in the non-food sector have had an impact on the high street since the recession began. As a result of these trends, the national shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to nearly 14% in 2012. The vacancy rate within Winchester town centre is lower than the current national average (9.3%), and the vacancy rate has increased only slightly since 2007 (8.4%), which may suggest overall Winchester has not suffered to the same extent as other town centres across the county. Vacancy levels are still relatively high in the Brooks Centre, but lower in the High Street. Nevertheless Winchester's vacancy can still be improved. The vacancy rate in Bishops Waltham, Alresford and Wickham is very low.

New Forms of Retailing

2.11 New forms of retailing have continued to grow as an alternative to more traditional shopping facilities. Home/electronic shopping has increased with the increasing growth in the use of personal computers, smart phones and the internet. The growth of multi-channel retailing including home computing, internet connections and interactive TV may lead to continued growth in home shopping and may have effects on retailing in the high street.

2.12 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure (about 7.5% of all retail expenditure). Recent national trends suggest continued strong growth in this sector, but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 11 (October 2013) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 10% in mid-2013 against 4.7% in June 2008 and just 2.9% as recently as March 2007.

Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our new forecast has the SFT share of total retail sales reaching 17.4% by 2020, rising to 20% by the end of the 2020s."

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

2.14 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Retailers are also increasingly providing "click and collect" facilities within stores. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

2.15 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express and Sainsbury's Local stores has increased significantly during the last decade, due to the operator's national expansion in this sector, and perhaps also due to the absence of available sites for larger food stores.

2.16 The Centre for Retail Research's Retail In 2018 report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018. However the number of shops units within town centres has declined consistently since the early 1970's. The Centre for Retail Research's figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. This trend hides structural trends towards fewer but larger retail stores, store extensions and significant out of centre development. Valuation Office data indicates the amount of retail floorspace in England and Wales grew by over 3% during the economic downturn (2008 to 2012), during a period of low expenditure growth and rapid growth in on-line shopping. This trend will to a large extent reflect the increase in large out-of-centre retail outlets and the increase in retail floorspace within town centres is likely to be much lower. These trends suggest that town centres must continue to evolve and change if their long term vitality and viability are to be maintained.

2.17 The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade. The Aldi store at Week in Winchester is an example of this trend.

2.18 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The physical scope to extend existing food stores may have restricted this trend in Winchester. The recent recession has halted this trend for extensions nationally.

2.19 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

2.20 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. The discount comparison sector has also grown significantly in recent years e.g. pound shops.

2.21 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres.

2.22 Most vacant shop units in Winchester town centre are less than 150 sq.m gross, and there are a limited number of medium to large units over 200 sq.m gross. Existing small shop premises are unlikely to be attractive to most comparison multiple retailers in the future, and the demand for these small units is likely to continue to be dominated by the independent, charity and discount sectors.

2.23 Nationally operator demand for space has decreased during the recession and, of those national multiples looking for space many prefer to locate in larger centres such as Southampton, Winchester and Basingstoke. Demand from multiples within Winchester Council area’s smaller centres is likely to be much weaker, which will affect the appropriate strategies for individual centres.

2.24 The strategy in Winchester town centre should be to provide a mix of large and small units for both multiple and independent retailers. In other smaller centres (excluding Whiteley) demand from multiple retailers is likely to be more limited, therefore seeking to maintain high shop occupancy rates and small scale extensions are likely to be the priority.

Changes to the Shopping Hierarchy

2.25 The Javelin Group's VENUESCORE evaluates shopping destinations in terms of the provision of multiple retailers – including anchor stores, operators fashion multiples and non-fashion multiples.

2.26 Winchester town centre's position in the national rank has improved between 2010 and 2013, up from 136th to 122nd (see table below). However within the Hampshire shopping hierarchy, Winchester's position has not changed significantly. Reading and Southampton are the main city centres at the top of the shopping hierarchy. Winchester town centre is a second tier centre, but has the lowest VENUESCORE at this level behind Basingstoke, Salisbury and Portsmouth.

VENUE	Location Grade	VENUESCORE	2013 Rank	2010 Rank
Reading	Major City	397	13	10
Southampton	Major City	330	19	19
Basingstoke	Regional	225	53	56
Salisbury	Regional	186	81	79
Portsmouth	Regional	176	98	106
Winchester	Regional	159	122	136
Fareham	Sub-Regional	131	175	208
Andover	Sub-Regional	119	195	188
Eastleigh	Sub-Regional	102	229	251
Waterlooville	Sub-Regional	83	299	277
Petersfield	Major District	65	395	412
Havant	Major District	55	469	441

3.0 Retail Capacity

3.1 This section assesses the quantitative scope for new retail floorspace in Winchester City Council's area up to 2031. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary values expressed in this analysis are at 2011 prices unless stated otherwise. The previous 2012 Study Update was based on 2010 prices and therefore the figures are not directly comparable.

Methodology and Data

3.3 The quantitative analysis is based on a study area defined for the Winchester Council area, which includes Winchester, Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham, as defined in the original 2007 Retail Study.

Consumer Expenditure

3.4 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2011 have been obtained.

3.5 Experian's EBS (Experian Business Strategies) national expenditure information has been used to forecast expenditure within the study area. Between 2011 to 2015 Experian's forecasts suggest convenience goods expenditure is expected to decline during this period, whilst comparison goods expenditure is expected to grow. In the longer term Experian's forecast growth rates suggest 0.8% per annum growth for convenience goods. Experian's longer term (after 2014) growth forecast for comparison goods is 2.9% per annum.

3.6 We believe that the EBS growth rates reflect the current economic downturn, with lower growth between 2011 to 2015. The longer term growth rates for comparison goods are lower than projections based on past trend lines but in our view are more realistic and sustainable.

Population

3.7 Base year population figures within previous retail updates were based on Hampshire County Council projections from the 2001 Census. Experian now provides 2011 Census based population figures for small areas, which have been adopted in this update.

3.8 For the Winchester authority area, population projections contained within the Council's Housing Technical Paper (June 2011) have been adopted and adjusted to assume 12,500 dwellings between 2011 and 2031. Within peripheral parts of the study area that are outside Winchester, ONS 2011 Interim population projections have been adopted.

3.9 The study area population for 2011 to 2031 on this basis as set out in Table 1B in Appendix 2.

Available Spending

3.10 The levels of available spending are derived by combining the population in Table 1B in Appendix 2 with per capita spending figures Table 2B for convenience goods in Appendix 2 and comparison goods in Table 1C in Appendix 3.

3.11 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

3.12 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of Trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.

3.13 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.9% and 9.7% of total convenience and comparison goods expenditure respectively in 2011. The projections provided by Experian suggest that these percentages could increase to 5.6% and 16% by 2030. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

3.14 As a consequence of growth in population and per capita spending, baseline convenience goods spending within the study area is forecast to increase from £402.61 million in 2013 to £485.74 million in 2031, as shown in Table 3B in Appendix 2.

3.15 Comparison goods spending is forecast to increase from £636.54 million in 2013 to £1,094.86 million in 2031, as shown in Table 2C in Appendix 3. These figures relate to real growth and exclude inflation.

Existing Spending Patterns 2013

Convenience Shopping

3.16 The results of the household shopper questionnaire survey, undertaken by NEMS in 2012 and 2007 have been used to estimate existing shopping patterns within the Study area. NLP has made adjustments to market shares to reflect recent changes in retail provision for example the redevelopment of Whiteley shopping centre. Changes in special forms of trading including home shopping have been taken into account.

3.17 Table 5B in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Winchester authority area at 2013 is estimated to be £213.01 million.

3.18 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A in Appendix 1, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

3.19 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 2, for consistency with the use of goods based expenditure figures.

3.20 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,500 per sq.m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Winchester district is £206.29 million. These figures suggest that collectively convenience retail facilities in Winchester district are trading 3% above national average levels.

Comparison Shopping

3.21 Winchester district attracts £264.33 million of comparison goods expenditure in total in 2013 (Table 3C in Appendix 3).

3.22 Company average sales densities are only available for a selection of multiple retailers. Estimated benchmark turnover levels for comparison goods shops are shown in Table 3A, 4A and 5A.

3.23 The current level of comparison expenditure attracted to facilities in Winchester district is £264.33 million, which suggests an average turnover density of around £4,500 per sq.m net (58,319 sq.m net in total – see Tables 3A, 4A and 5A in Appendix 3). NLP would normally anticipate comparison goods turnover densities between £4,000 to £6,000 per sq.m net. On balance, comparison shopping facilities within Winchester district appear to be trading satisfactorily.

Quantitative Capacity for Convenience Floorspace

3.24 The level of available convenience goods expenditure in the baseline scenario in 2018, 2021, 2026 and 2031 is shown at Tables 5B to 10B in Appendix 2.

3.25 The total level of available convenience goods expenditure available for shops in Winchester between 2013 and 2031 is summarised in Table 12 (Appendix 2). The benchmark turnover of existing convenience floorspace and food store commitments has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

3.26 Table 11B in Appendix 2, assumes that the benchmark turnover of convenience floorspace will not increase during 2013 to 2031 due to the recession. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.1% per annum growth is recommended between 2021 to 2031 (Source: Experian Retail Planner Briefing - September 2013). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

3.27 The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 12B, Appendix 2. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores.

3.28 In the study area as a whole there is currently a small surplus of convenience expenditure (+£6.73 million) in 2013. By 2021 the implementation of commitments (e.g. Sainsbury's at Bishop's Waltham) will absorb this surplus expenditure and create a deficit of -£9.28 million. Longer term expenditure growth will generate a surplus of +£22.88 million by 2031.

Quantitative Capacity for Comparison Floorspace

3.29 We have projected the level of comparison goods expenditure available to shops in Winchester district at 2018, 2021, 2026 and 2031 as shown in Tables 4C to 7C in Appendix 3.

3.30 Future available expenditure is compared with the projected turnover of existing and retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 8C.

3.31 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Table 8C therefore assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted as recommended by Experian.

Retail Floorspace Projections

3.32 Surplus convenience expenditure has been converted into net floorspace projections in Table 12B, Appendix 2. For the district as a whole, up to 2,159 net sq.m convenience floorspace could be supported up to 2031 (3,084 sq.m gross assuming a 70% net to gross ratio).

3.33 Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 9C in Appendix 3. Surplus expenditure at 2031 could support 2,710 sq.m net (3,959 sq.m gross) of comparison goods floorspace in the District as a whole.

4.0 Scope for Accommodating Growth

Accommodating Future Growth

4.1 The sequential approach suggests that designated town centres should be the first choice for retail development. The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

4.2 There were 33 vacant shop units within Winchester town centre in September 2012, a vacancy rate of about 9.3% which is below the Goad national average (13.9%). The number of vacant units has not changed significantly since 2012. The vacancy rate is relatively low in other centres in the District, excluding the new Whiteley centre where unoccupied units are treated as a development commitment in this study, and have therefore already been taken into account.

4.3 Within Winchester town centre vacant premises should help to accommodate growth. For example, if the current vacancy level fell from 9.3% to 5% then reoccupied units could accommodate about 1,500 sq.m gross of retail space (assuming 100 sq.m gross per unit). The most successful shopping centres tend to have a vacancy rate of around 5% at any given time reflecting the normal churn of occupiers. If this reduction in vacant units can be achieved then the overall retail floorspace projection within Winchester would reduce from 6,300 sq.m gross to 4,800 sq.m gross.

4.4 The short to medium term priority in the District should be the reoccupation of vacant floorspace in Winchester town centre and at Whiteley, and the implementation of retail commitments. This short term strategy should not preclude investment within appropriate town centre locations.

Potential Development Opportunities

4.5 A review of potential development sites identified in the 2007 study has been undertaken. Sites in each centre were evaluated, in terms of their implications on the scope and need for additional retail facilities. The analysis of sites has been revisited in this report and have been re-assessed against the following factors:

- existing land uses and availability, categorised as follows:
  - short to medium term – up to 2021;
  - long term - likely to be completed after 2021;
- commercial potential for retail development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;

  - secondary site – which may generate limited demand or only demand for a specific kind of use.

- potential scope to accommodate additional retail floorspace (net increase), categorised as follows:
  - small scale - under 1,000 sq.m gross floorspace;
  - medium scale – 1,000 to 2,500 sq.m gross floorspace;
  - large scale - over 2,500 sq.m gross floorspace;
- potential development constraints; and
- possible alternative uses.

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

- Good - development sites that have good prospects for providing additional retail/leisure 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 floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- Poor - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

4.7 As in the 2007 study, the overall rating is based on an initial evaluation for each site, rather than a detailed appraisal of development constraints, land ownership and potential development costs. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for each centre.

Winchester Town Centre

4.8 The requirement for additional floorspace to accommodate new Class retail floorspace in Winchester town centre (over and above commitments) is 6,300 sq.m gross by 2031. It is reasonable to assume that some of this projection (up to 1,500 sq.m gross) could be met by the reoccupation of vacant floorspace in the town centre.

4.9 The development brief for the Station Road approach area identifies four site opportunities with immediate development potential, subject to car parking strategy issues, as follows:

- the Cattlemarket site;
- Station car park east;
- Station car park west; and
- the Carfax site.

4.10 Part of the Carfax site is identified as having potential for mixed use development including leisure and retail on the ground floor with offices/hotel/ residential on the upper floors. Retail/restaurant floorspace is estimated at 400 to 650 sq.m, and a further 400 sq.m is identified on the Cattlemarket site as part of a mixed use development.

4.11 Other potential development sites within or adjacent to Winchester town centre could also meet the remaining floorspace projection, as follows:

- Middle Brook Street Car Park;
- Infill plot Southgate Street;
- National Tyres, Southgate Street; and
- Chesil Street Car Park.

Bishop's Waltham

4.12 There is no requirement for additional retail floorspace in Bishop's Waltham over and above the Sainsbury's commitment. Future investment is likely to focus on the reoccupation of vacant shops units or small scale extension and infill developments. If further developer/operator interest for retail uses emerges the main potential development areas are:

- The Malt Lane area; and
- The Social Club and car parks.

Denmead

4.13 There is no requirement for additional retail floorspace in Denmead up to 2031. Future investment is likely to focus on the reoccupation of vacant shops units or small scale extension and infill developments. The Kidmore Lane car park could accommodate further development, if needed.

New Alresford

4.14 The requirement for additional retail floorspace in New Alresford is about 300 sq.m gross at 2026 increasing to 600 sq.m gross by 2031, mostly for comparison goods floorspace. Some of this growth can be accommodated in vacant units. Potential development sites within New Alresford that could accommodate growth are:

- The Dean employment area;
- The Fire station; and
- Post Office depot.

Wickham

4.15 The requirement for additional retail floorspace in Wickham is about 800 sq.m gross at 2026 increasing to 1,000 sq.m gross by 2031, mostly for convenience goods floorspace. There is limited potential to accommodate this growth within vacant units or large scale development sites. Future investment is likely to focus on small scale extension and infill developments.

4.16 The future situation in Wickham is likely to be affected by the proposed strategic development of Welborne, to the south in Fareham Borough, which is likely to include significant retail provision and should be taken into account before additional provision is planned for the small historic centre of Wickham.

Whiteley

4.17 The requirement for additional retail floorspace in Whiteley is about 1,400 sq.m gross at 2031, mostly for convenience goods floorspace. This projection is likely to be met mainly by the development of new local centres in association with the North Whiteley development and additional provision may be possible by the insertion of new mezzanine floors or the extension to existing units.

5.0 Review of Centre Frontages

Introduction

5.1 This section reviews shopping frontage and boundary policies options within Winchester.

5.2 It is important that town centres maintain their primary retail function, whilst increasing their diversity with a range of complementary uses, promoting competitive town centre environments. There are strong linkages between retail and leisure activity, and town centres are well placed to benefit from these trends. Vital and viable town centres have a good mix of uses that extend activity throughout the daytime and into the evenings.

5.3 The main function of the primary shopping area within centres should remain in Class A1 retail use, but town centres also need a variety of other services such as banks, restaurants and personal services, which add interest and vitality. Emerging Local Plan policy will need to address the appropriate policy approach and the extent of frontage designations within centres.

Town Centre Boundaries

5.4 The designation of a primary shopping areas and/or centre boundaries is important when applying the sequential approach and directing retail and town centre uses to sustainable locations.

5.5 The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

5.6 Bishop’s Waltham, Denmead, New Alresford and Wickham are relatively small town centres. These centres do not have significant areas adjoining the PSA where other commercial uses are located e.g. leisure, business and other main town centre uses. In these centres the town centre boundary is unlikely to extend significantly beyond the primary shopping frontages. The relatively limited area between the primary shopping frontage and the town centre boundary will include secondary frontages. Supporting text to new policies should make clear that the town centre boundary within in Bishop’s Waltham, Denmead, New Alresford and Wickham represents the town centre for the purposes of applying the sequential approach. The extent and nature of the shopping frontages is addressed below.

5.7 Winchester is a larger centre and has civic and office uses that are included within the current town centre boundary. In Winchester town centre separate town centre and primary shopping area boundaries and also shopping frontages would be appropriate. The PSA in Winchester should be tightly drawn around designated primary and secondary frontages, and this is the relevant areas for focusing retail development under the sequential approach. The wider town centre boundary will continue to include the primary shopping area and other adjacent commercial areas where other main town centre uses can be encouraged.

5.8 Emerging policy should indicate that the first preference for Class A retail uses will be within the defined primary shopping area in Winchester town centre and the defined town centre boundaries of other centres. The first preference for other main town centre uses should be the town centre boundaries in all town and local centres.

5.9 Retail and other main town centre uses outside of these areas will need to comply with the sequential approach and impact tests as set out in the NPPF.

Primary and Secondary Shopping Frontages

5.10 The NPPF indicates that policies that control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. Planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. The NPPF provides limited guidance on the definition of primary and secondary frontages, or how policy should seek to balance diversity and the need to maintain retail uses in town centres.

5.11 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres. However, a laissez faire approach in Winchester's centres could result in the deterioration of shopping frontages and could undermine their role as shopping centres. This approach could lead to a significant increase in the proportion of non-shop uses. The emergence of a large number of vacant premises within shopping frontages may be the only circumstances where this approach could be appropriate. The number of vacant units within the District is relatively low and there is no need for planning policies to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas.

5.12 In NLP's view shopping frontage policies would still be beneficial in Winchester district to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity.

5.13 A ban on changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. In secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres. In addition there is no evidence that suggests Winchester's town centres have a harmful or disproportionately high level of non-shop uses at present, or that the proportion of non-retail uses has increased significantly in recent years.

5.14 The designation of primary and secondary frontages could be an appropriate approach in Winchester town centre, but a clear policy approach should be considered relating to frontages. The wording of policies should provide sufficient flexibility to allow non-retail uses to secure representation in Winchester town centre, where the proposed use would not be harmful to the town centre's vitality and viability or residential amenity.

5.15 In Bishop's Waltham, Denmead, New Alresford and Wickham the function of these centres relies on the overall balance between retail and non-retail services, i.e. Classes A1 to A5. In these centres a single primary frontage designation should be considered to protect Class A1 retail uses, and a more flexible approach applied in the rest of the town centre to accommodate other non-retail services (Classes A2 to A5).

5.16 The Council should seek to protect against the loss of ground floor Class A1 retail uses within designated primary frontages in all town centres. However, if the policy is to be defensible then the primary frontages should be appropriately drawn, and should not include areas where Class A1 use is not the predominant use or where some degree of flexibility and diversification would be acceptable or necessary to maintain or enhance the shop frontage.

5.17 Based on NLP's experience, primary frontage policies generally fall into three broad categories:

- an embargo on non-Class A1 retail uses within tightly drawn primary frontages, but with a more flexible approach in secondary shopping frontages;
- maximum thresholds for non-retail uses in shopping frontages; and
- criteria based policies relating to impacts e.g. economic and amenity.

5.18 The first approach provides clarity but is relatively inflexible and may prevent non-retail uses that would enhance the vitality and viability of a centre, unless there are exceptional circumstances that may apply.

5.19 Under the second approach policies can include a maximum limit of frontage to be in non-A1 retail uses, either in terms of the proportion of uses or measured frontage. These types of policies can relate to individual sections of the frontages or the frontages as a whole.

5.20 The third approach offers the most flexibility and allows decision makers to consider applications on a case by case basis, but this approach provides less clarity for investors/applicants and more subjective criteria can be challenged.

5.21 Primary shopping frontages can be appropriately drawn in the town centres where there is a predominance of Class A1 retail uses. A strong restriction on all changes of use from Class A1 could be introduced in these frontages if a flexible approach is adopted elsewhere in the town centres.

5.22 The pedestrianized section of Winchester High Street is the core of the shopping area, and this area contains a predominance of Class A1 retail use and the main concentration of medium/large retail premises occupied by national multiples. In NLP's view retaining Class a uses in this area will help to maintain the vitality and viability of the Winchester town centre as a comparison shopping destination. The Council should consider designating the following sections as primary shopping frontages:

- Numbers 7 to 23-24 High Street (south side);
- Numbers 1 and 2 Old Market House;
- Numbers 25 to 47 High Street (south side);
- Numbers 103 to 153 High Street (north side); and
- The Brooks Shopping Centre.

5.23 In addition to these areas, the Council will need to consider how frontages are defined within the Silver Hill development, when the nature and mix of uses has been established within the scheme. It is likely that most of the development will be primary frontage.

5.24 Over 85% of shop premises within this central section of the High Street and the Brooks Centre are within Class A1 use. By way of comparison less than 65% of shop premises on the west and east sections of the High Street are in Class A1 use. Other shop frontages within the centre have around 60% of premises in Class A1 use. Al other frontages can be designated as secondary shopping frontage, which will have a greater mix of Class A uses.

5.25 Within Winchester's suggested primary shopping frontages there should be a strong presumption against the loss of ground floor Class A1 units, unless the proposed use can demonstrate exceptional circumstances where it is essential to promote the vitality and viability of that part of the town centre. These proposals would also need to show that they do not undermine the retail function of the centre and will not disrupt shopping pattern/footfall and will attract people to the centre, enhancing the centre's vitality and viability.

5.26 In order to promote extended trading hours restaurants, café and bars (Class A1, A3 and A4) could be encouraged to locate in designated secondary shopping frontages in Winchester, particularly on Jewry Street and City Road, and there could be no policy restriction on these uses, other than amenity/transport impact issues. These uses can also be encouraged within upper floors of the primary shopping frontages.

5.27 As indicated above, in NLP's view it is not necessary to define separate primary and secondary shopping frontages within other town centres, because their function relies on the overall balance between retail and non-retail services. In these centres a single primary shopping frontage designation should be considered to protect Class A1 retail uses, and promote non-retail services (Class A2 to A5) elsewhere in the town centres.

6.0 Conclusions

6.1 This report provides an update of the need for retail development in Winchester District. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Winchester District

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period. This report provides this assessment, enabling sites to be allocated and development management policies to be produced in Local Plan Part 2.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Long term forecasts beyond 2018 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2018 is attributable to projected growth in spending per capita as well as population growth. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Winchester.

Retail Floorspace Projections

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

6.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development over and above commitments. The projections suggest new floorspace (over and above commitments) should be distributed as follows:

Table 6.1: Convenience Goods Retail Floorspace Projections

Centre	Existing Commitments Sales Sq.m Net	Additional Retail Floorspace Sq.M Gross (over and above commitments)			
		2013-2021	2021-2026	2026-2031	Total 2013-2031
Winchester urban area	1,065	50	1,250	1,150	**2,450**
Bishop's Waltham	2,279	0	0	0	**0**
Denmead	350	0	0	0	**0**
New Alresford	0	0	50	100	**150**
Wickham	0	550	150	150	**850**
Whiteley	700	0	300	800	**1,100**
Rural shops	0	0	0	0	**0**
Total	**4,394**	**600**	**1,750**	**2,200**	**4,550**

Table 6.2: Comparison Goods Retail Floorspace Projections

Centre	Existing Commitments Sales Sq.m Net	Additional Retail Floorspace Sq.M Gross (over and above commitments)			
		2013-2021	2021-2026	2026-2031	Total 2013-2031
Winchester other	5,234	0	0	3,800	**3,800**
Winchester retail warehouses	1,700	0	0	0	**0**
Bishop's Waltham	976	0	0	0	**0**
Denmead	200	0	0	0	**0**
New Alresford	0	100	200	200	**500**
Wickham	0	50	50	100	**200**
Whiteley	800	0	0	300	**300**
Rural shops	0	0	0	0	**0**
Total	**8,910**	**150**	**250**	**4,400**	**4,800**

6.7 Where floorspace figures are recorded as zero in Tables 6.1 and 6.2 there is a projected over-supply of retail floorspace, and there is a negative floorspace projection. There may be some potential for this over-supply of floorspace to meet projected growth within other parts of the District. For example the over-supply of retail warehouse floorspace in Winchester could reduce the need for additional floorspace in the rest of Winchester. The comparison floorspace projection could therefore be viewed as a high estimate.

6.8 Elsewhere in the District there is limited potential to transfer growth to areas where there is an over-provision of retail space because the catchment areas of the main towns over-lap to a limited extent.

Accommodating Growth

6.9 The sequential approach suggests that designated town centres should be the first choice for retail development. In considering this important issue the following factors should be assessed.

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Winchester district?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

6.10 Some forms of retail facilities, which serve more localised catchment areas, may be more appropriate within local centres, rather than the main centres. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

6.11 Within Winchester town centre the reoccupation of vacant premises could reduce the overall retail floorspace projection within Winchester from around 6,300 sq.m gross to 4,800 sq.m gross.

6.12 The short to medium term priority in the District should be the reoccupation of vacant floorspace in Winchester town centre, and the implementation of retail commitments. In the longer term development sites within the town centre should be explored.

6.13 There is no requirement for additional retail floorspace in Bishop's Waltham, Denmead, over and above commitments. Future investment is likely to focus on the reoccupation of vacant shops units or small scale extension and infill developments.

6.14 In New Alresford some of the projected growth could be accommodated in vacant units. Other longer term potential development sites should be considered in New Alresford.

6.15 In Wickham there is limited potential to accommodate growth within vacant units or large scale development sites. Future investment is likely to focus on small scale extension and infill developments. Wickham will be affected by the retail provision within the proposed strategic development of Welborne, and this should be taken into account before additional provision is planned for the small historic centre of Wickham.

6.16 In Whiteley growth is likely to be met by the development of new local centres in association with the North Whiteley development and additional provision may be possible by the insertion of new mezzanine floors or the extension to existing units.

Appendix 1 Study Area/Existing Retail

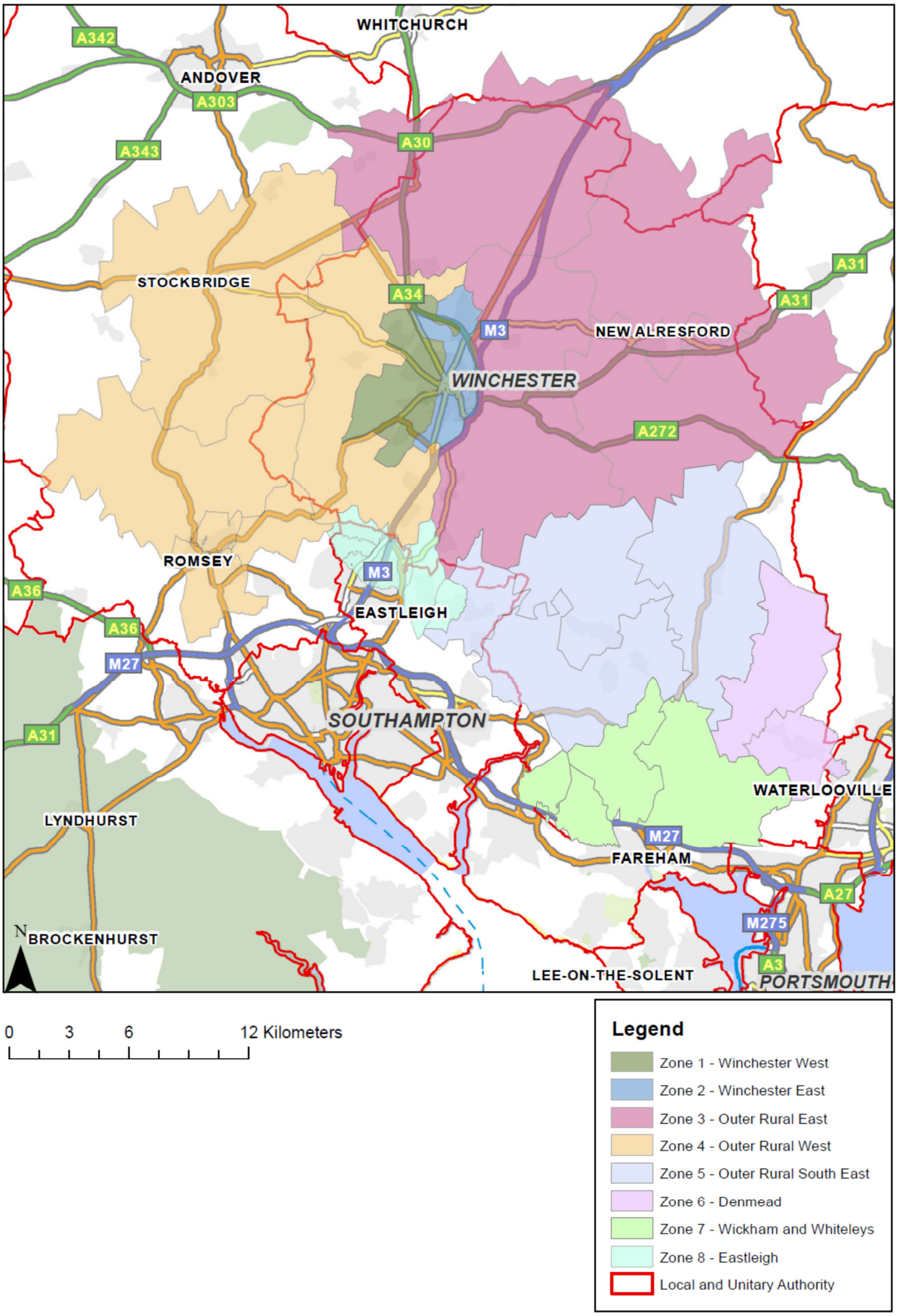

WHITCHURCH
A342
ANDOVER
A303
A343
A30
STOCKBRIDGE
A34
M3
NEW ALRESFORD
A31
A31
WINCHESTER
A272
ROMSEY
M3
EASTLEIGH
A36
A36
M27
A31
SOUTHAMPTON
WATERLOOVILLE
LYNDHURST
M27
FAREHAM
A27
M275
N
BROCKENHURST
A3
LEE-ON-THE-SOLENT
PORTSMOUTH
0 3 6 12 Kilometers
Legend
Zone 1 - Winchester West
Zone 2 - Winchester East
Zone 3 - Outer Rural East
Zone 4 - Outer Rural West
Zone 5 - Outer Rural South East
Zone 6 - Denmead
Zone 7 - Wickham and Whiteleys
Zone 8 - Eastleigh
Local and Unitary Authority

Table 1A : Convenience Shops in Winchester (2011 Prices)

Centre/Stores	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace Sq M	Company * Average Per Sq M	Benchmark Total £M Turnover
Winchester City Centre						
Sainsbury's	1,929	623	95%	592	£12,537	£7.42
Marks & Spencer (food hall)	n/a	700	100%	700	£11,186	£7.83
Iceland	n/a	473	98%	464	£7,265	£3.37
Other small convenience shops (15)	1,356	949	100%	949	£4,500	£4.27
City Centre Sub-Total	**n/a**	**2,745**		**2,705**		**£22.89**
Winchester Urban Area						
Co-op, City Road	n/a	183	98%	179	£7,496	£1.34
Co-op, Stoney Lane, Weeke	428	212	98%	208	£7,496	£1.56
Waitrose, Stockbridge Road	n/a	1,764	90%	1,588	£11,474	£18.22
One Stop, Stanmore	n/a	134	98%	131	£11,126	£1.46
One Stop, Winnall	n/a	88	98%	86	£11,126	£0.96
Sainsbury's, Badgers Farm	n/a	5,098	n/a	3,848	£12,537	£48.24
Tesco Express, Harestock	277	163	98%	160	£11,126	£1.78
Tesco Express, Kings Worthy	204	112	98%	110	£11,126	£1.22
Tesco Express, Andover Road	296	207	98%	203	£11,126	£2.26
Tesco Extra, Winnall	n/a	5,823	n/a	3,706	£11,126	£41.23
Majestic Wine	n/a	270	100%	270	£4,500	£1.22
Aldi, Weeke	1,193	760	85%	646	£7,731	£4.99
Other small convenience shops	n/a	600	100%	600	£4,500	£2.70
Urban Area Sub-Total	**n/a**	**15,414**		**11,735**		**£127.18**
Winchester Urban Area Total	**n/a**	**18,159**		**14,439**	**£10,393**	**£150.07**
Bishops Waltham						
Budgens	975	539	98%	528	£4,250	£2.24
Co-op (x2)	390	186	98%	182	£7,496	£1.37
Local Shops	557	329	100%	329	£4,500	£1.48
Bishops Waltham Total		**1,054**		**1,040**		**£5.09**
Denmead						
Co-op	578	379	98%	371	£7,496	£2.78
Local Shops	n/a	92	100%	92	£4,500	£0.41
Denmead Total		**471**		**463**		**£3.20**
New Alresford						
Tesco Express, 12-14 Broad Street	399	208	97%	202	£11,126	£2.24
Co-op	427	300	95%	285	£7,496	£2.14
Local Shops	511	271	100%	271	£4,500	£1.22
New Alresford Total		**779**		**758**		**£5.60**
Wickham						
Co-op	466	346	98%	339	£7,496	£2.54
Local Shops	n/a	205	100%	205	£4,500	£0.92
Wickham Total		**551**		**544**		**£3.46**
Other Rural Local Shops	**3,500**	**2,450**	**100%**	**2,450**	**£4,250**	**£10.41**
Winchester Rural Area Total	**n/a**	**5,305**		**5,255**	**£5,284**	**£27.77**
Whiteley						
Tesco	3,315	1,887	95%	1,793	£11,126	£19.95
Marsk & Spencer Food hall	n/a	n/a	n/a	700	£11,186	£7.83
Other Whiteley Village	200	150	100%	150	£4,500	£0.68
Whiteley Total		**2,037**		**2,643**	**£10,766**	**£28.45**
Winchester LA Total	**n/a**	**25,501**		**22,337**	**£9,235**	**£206.29**
	Comparison Floorspace in Food stores					**3,165**

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

Sources: *Retail Rankings and Verdict 2012* *Institute of Grocery Distribution*
Goad Plans (Winchester Sept 2012, Bishops Waltham Oct 2012, New Alresford Nov 2012)

Table 2A: Convenience Retail Commitments (2011 Prices)

	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace SqM	Company * Average Per Sq M	Benchmark Total £M Turnover
Gains						
Sainsbury's City Centre - New Store*	2,429	1,579	90%	1,421	£12,537	£17.82
Sainsbury's, Bishop Waltham		3,255	70%	2,279	£12,537	£28.57
Barton Farm Local Centre		700	100%	700	£4,500	£3.15
West of Waterlooville Local Centre		350	100%	350	£4,500	£1.58
North Whiteley Local Centres		700	100%	700	£4,500	£3.15
Total Gains		**6,584**		**5,450**		**£54.26**
Losses						
Sainsbury's, City Centre	1,929	623	95%	592	£12,537	£7.42
Iceland, City Centre	n/a	473	98%	464	£7,265	£3.37
Total Losses		**1,096**		**1,055**		**£10.79**
Net Increase Total	**n/a**	**5,488**		**4,394**		**£43.47**

** Silver Hill Scheme 65% net:gross assumed*

Sources: *Retail Rankings and Verdict 2012*

Table 3A: Comparison Shops within Winchester's Centres 2013 (2011 Prices)

Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Comparison Shops in Winchester Town Centre				
Argos (£M per outlet)	300	100	n/a	£6.07
Beales	2,970	2,200	£1,111	£2.44
Blacks Outdoor Retail	180	130	£3,216	£0.42
Boots The Chemist	1,010	750	£10,764	£8.07
Clarks (£M per outlet)	330	250	n/a	£1.21
Debenhams	4,170	3,100	£2,768	£8.58
Ernest Jones	120	90	£14,622	£1.32
Fat Face (£M per outlet)	310	230	n/a	£1.01
HMV (2010/11)	310	230	£7,134	£1.64
Jaeger (£M per outlet)	90	70	n/a	£0.74
Laura Ashley (£M per outlet)	540	405	n/a	£1.14
Lloyds Pharmacy (x2)	260	195	£16,555	£3.23
London Camera Exchange (£M per outlet)	50	40	n/a	£0.60
Long Tall Sally (£M per outlet)	110	80	n/a	£0.87
Marks & Spencer	1,620	1,200	£4,942	£5.93
Monsoon	160	112	£2,119	£0.24
Moss Bros (£M per outlet)	240	180	n/a	£0.84
Mulityork (£M per outlet)	340	250	n/a	£0.85
New Look	640	480	£3,339	£1.60
Next	680	476	£4,416	£2.10
O2	120	90	£8,478	£0.76
Orange (Everything Everywhere)	60	40	£14,458	£0.58
Paperchase (£M per outlet)	70	49	n/a	£0.88
Phones 4 U	240	180	£15,212	£2.74
River Island	420	310	£10,339	£3.21
Robert Dyas	150	105	£3,600	£0.38
Russell & Bromley (£M per outlet)	230	161	n/a	£2.76
Specsavers	150	100	£9,828	£0.98
Stead & Simpson (2006/07)	120	90	£3,788	£0.34
Superdrug	470	352	£5,068	£1.78
The Body Shop (£M per outlet) (2010/11)	180	130	n/a	£0.59
The Carphone Warehouse	110	80	£21,026	£1.68
The Edinburgh Woollen Mill	220	160	£2,098	£0.34
Timpson (£M per outlet)	90	70	n/a	£0.16
Vision Express (£M per outlet)	200	150	n/a	£1.20
Vodafone	100	80	£10,487	£0.84
Waterstones (x2)	930	700	£3,173	£2.22
WH Smith	1,080	756	£3,486	£2.64
Other Comparison shops	17,040	11,000	£5,000	£55.00
Food stores (comparison space only)	n/a	41	£5,000	£0.20
Winchester Town Centre Total	**n/a**	**25,212**	**£5,084**	**£128.18**
Winchester Urban Area - Local Centres	**n/a**	**700**	**£4,000**	**£2.80**

Sources: *Winchester Goad September 2012*
Retail Rankings 2013

Table 4A: Comparison Shops within Other Main and Local Centres 2013 (2011 Prices)

Location	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Bishops Waltham	1,400	£4,000	£5.60
Denmead	200	£4,000	£0.80
New Alresford	2,100	£4,000	£8.40
Wickham	600	£4,000	£2.40
Other Rural Local Centres	1,300	£4,000	£5.20
Whiteley Village (comparison occupied)	13,000	£5,000	£65.00
Total	**18,600**		**£87.40**

Sources: *Goad (Bishops Waltham Oct 2012, New Alresford Nov 2012)*
PP. 09/00658/OUT (Redev of Whiteley Centre)

Table 5A: Comparison Floorspace within Retail Warehouses/Out of Centre Food Stores (2011 Prices)

Retail Warehouses in Winchester	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Easton Lane Retail Park			
Homebase	4,500	£1,252	£5.63
Downs Carpets	1,000	£1,000	£1.00
Currys	1,000	£6,125	£6.13
Halfords	800	£2,904	£2.32
Scats	600	£2,000	£1.20
Pets At Home	900	£2,606	£2.35
Fabric Warehouse	600	£2,000	£1.20
Winchester Trade Park			
Topps Tiles	300	£1,192	£0.36
Carpetright	400	£1,104	£0.44
Andover Road Retail Park			
Brewers	170	£1,500	£0.26
Pets Corner	170	£2,000	£0.34
Retail Warehouse Sub-Total	**10,440**		**£21.22**
Out-of-Centre Food Stores			
Tesco, Winnall (non-food sales only)	2,117	£10,079	£21.34
Sainsbury Badger Farm (non-food sales only)	1,250	£7,440	£9.30
Food Store Sub-Total	**3,367**		**£30.64**
Out-of-Centre Total	**13,807**	**£3,756**	**£51.86**

Sources: Retail Rankings 2013 and VOA

Table 6A: Comparison Floorspace in Commitments (2011 Prices)

Location	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Commitments - Gains			
Silver Hill Development (1)	5,864	£6,000	£35.18
Sainsbury town centre (non-food sales only) (2)	158	£7,440	£1.18
Winchester Trade Park (max. permitted additional A1)	1,700	£2,000	£3.40
Sainsbury's, Bishop Waltham (non-food sales only)	976	£7,440	£7.26
Barton Farm Local Centre	500	£4,000	£2.00
West of Waterlooville Local Centre	200	£4,000	£0.80
Whiteley Village (vacant space)	600	£5,000	£3.00
North Whiteley Local Centres	200	£4,000	£0.80
Total - Gains	**10,198**	**£5,258**	**£53.62**
Commitments - Losses			
Silver Hill Development	1,250	£5,000	£6.25
Sainsbury (non-food sales only)	31	£7,440	£0.23
Iceland (non-food sales only)	7	£7,265	£0.05
Total - Losses	**1,288**	**£5,071**	**£6.53**
Total Net Increase	**8,910**		**£47.09**

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

Appendix 2 Convenience Goods Capacity

Table 1B: Population Projections

Zone	2011	2013	2018	2021	2026	2031
Zone 1: Winchester - West	28,438	28,576	29,089	29,550	30,366	31,086
Zone 2: Winchester - East	22,197	22,335	22,848	23,309	24,125	24,845
Zone 3: Outer Rural East	25,179	25,239	25,464	25,666	26,023	26,338
Zone 4: Outer Rural West	32,862	33,281	34,420	35,183	36,500	37,806
Zone 5: Outer Rural South East	27,687	27,747	27,972	28,174	28,531	28,846
Zone 6: Denmead/Waterlooville	10,803	11,009	11,780	12,471	13,695	14,775
Zone 7: Wickham & Whiteley	22,117	22,375	23,338	24,202	25,732	27,082
Zone 8: Eastleigh	40,847	40,962	41,250	41,423	41,715	42,008
Total	**210,130**	**211,523**	**216,160**	**219,978**	**226,686**	**232,785**

Sources:
2011 Population Census
Winchester District Council Housing Technical Paper June 2011 (adjusted for 12,500 dwellings between 2011-2031)
ONS 2011 interim projections for neighbouring LA's

Table 2B: Convenience Retail Expenditure Per Capita (2011 Prices)

	2013	2018	2021	2026	2031
Zone 1: Winchester - West	£1,836	£1,852	£1,881	£1,947	£2,015
Zone 2: Winchester - East	£1,823	£1,838	£1,867	£1,933	£2,001
Zone 3: Outer Rural East	£1,984	£2,000	£2,032	£2,103	£2,177
Zone 4: Outer Rural West	£1,933	£1,950	£1,980	£2,050	£2,122
Zone 5: Outer Rural South East	£2,066	£2,084	£2,117	£2,191	£2,268
Zone 6: Denmead/Waterlooville	£1,910	£1,927	£1,957	£2,026	£2,097
Zone 7: Wickham & Whiteley	£1,780	£1,795	£1,824	£1,888	£1,954
Zone 8: Eastleigh	£1,876	£1,892	£1,921	£1,989	£2,059

Sources:
Experian local estimates of 2011 convenience goods expenditure per capita
Excluding special forms of trading
Experian Business Strategies - forecast annual growth rates

Table 3B: Total Convenience Retail Expenditure (2011 Prices)

	2013	2018	2021	2026	2031
Zone 1: Winchester - West	£52.47	£53.87	£55.58	£59.12	£62.65
Zone 2: Winchester - East	£40.71	£42.00	£43.52	£46.63	£49.71
Zone 3: Outer Rural East	£50.06	£50.94	£52.15	£54.73	£57.34
Zone 4: Outer Rural West	£64.35	£67.11	£69.68	£74.83	£80.23
Zone 5: Outer Rural South East	£57.34	£58.29	£59.63	£62.51	£65.43
Zone 6: Denmead/Waterlooville	£21.03	£22.69	£24.40	£27.74	£30.98
Zone 7: Wickham & Whiteley	£39.83	£41.90	£44.13	£48.57	£52.92
Zone 8: Eastleigh	£76.83	£78.03	£79.58	£82.96	£86.49
Catchment Area Total	**£402.61**	**£414.83**	**£428.67**	**£457.10**	**£485.74**

Sources: Tables 1B & 2B

Table 4B: Estimated Convenience Shopping Penetration Rates 2013

Store/Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Winchester Urban Area	95%	97%	62%	24%	3%	0%	1%	12%	5%
Bishops Waltham	0%	0%	0%	0%	20%	0%	0%	0%	1%
Denmead	0%	0%	0%	0%	0%	12%	0%	0%	15%
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%
Wickham	0%	0%	0%	0%	3%	0%	9%	0%	5%
Rural Local Shops	0%	0%	3%	1%	5%	0%	1%	0%	1%
Whiteley	0%	0%	0%	0%	2%	2%	20%	0%	65%
Other Outside Winchester	5%	3%	25%	75%	67%	86%	69%	88%	n/a
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	***n/a***

Source: NEMS Household Survey April 2012 (Zones 1 to 4) and June 2007 (Zones 5 to 8) with NLP adjustments

Table 5B: Base Year Convenience Turnover in Winchester 2013

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2013 £M	**£52.47**	**£40.71**	**£50.06**	**£64.35**	**£57.34**	**£21.03**	**£39.83**	**£76.83**	**n/a**	**£402.61**
Winchester Urban Area	£49.84	£39.49	£31.04	£15.44	£1.72	£0.00	£0.40	£9.22	£7.74	£154.90
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£11.47	£0.00	£0.00	£0.00	£0.12	£11.58
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£2.52	£0.00	£0.00	£0.45	£2.97
New Alresford	£0.00	£0.00	£5.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£5.27
Wickham	£0.00	£0.00	£0.00	£0.00	£1.72	£0.00	£3.58	£0.00	£0.28	£5.58
Rural Local Shops	£0.00	£0.00	£1.50	£0.64	£2.87	£0.00	£0.40	£0.00	£0.05	£5.47
Whiteley Village	£0.00	£0.00	£0.00	£0.00	£1.15	£0.42	£7.97	£0.00	£17.71	£27.24
Winchester LA Total	**£49.84**	**£39.49**	**£37.55**	**£16.09**	**£18.92**	**£2.94**	**£12.35**	**£9.22**	**£26.61**	**£213.01**
Other outside Winchester	£2.62	£1.22	£12.52	£48.26	£38.41	£18.09	£27.48	£67.61	n/a	n/a
Total	**£52.47**	**£40.71**	**£50.06**	**£64.35**	**£57.34**	**£21.03**	**£39.83**	**£76.83**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 6B: Future Convenience Shopping Penetration Rates

Store/Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Winchester Urban Area	95%	97%	61%	24%	2%	0%	0%	10%	5%
Bishops Waltham	0%	0%	1%	0%	45%	2%	2%	0%	5%
Denmead	0%	0%	0%	0%	0%	11%	0%	0%	15%
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%
Wickham	0%	0%	0%	0%	2%	0%	9%	0%	5%
Rural Local Shops	0%	0%	3%	1%	5%	0%	1%	0%	1%
Whiteley	0%	0%	0%	0%	1%	1%	25%	0%	60%
Other Outside Winchester	5%	3%	25%	75%	45%	86%	63%	90%	n/a
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	***n/a***

Source: NEMS Household Survey April 2012 (Zones 1 to 4) and June 2007 (Zones 5 to 8) adjusted to take account commitments

Table 7B: Convenience Turnover in Winchester 2018

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2018 £M	**£53.87**	**£42.00**	**£50.94**	**£67.11**	**£58.29**	**£22.69**	**£41.90**	**£78.03**	**n/a**	**£414.83**
Winchester Urban Area	£51.17	£40.74	£31.07	£16.11	£1.17	£0.00	£0.00	£7.80	£7.79	£155.85
Bishops Waltham	£0.00	£0.00	£0.51	£0.00	£26.23	£0.45	£0.84	£0.00	£1.48	£29.51
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£2.50	£0.00	£0.00	£0.44	£2.94
New Alresford	£0.00	£0.00	£5.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£5.36
Wickham	£0.00	£0.00	£0.00	£0.00	£1.17	£0.00	£3.77	£0.00	£0.26	£5.20
Rural Local Shops	£0.00	£0.00	£1.53	£0.67	£2.91	£0.00	£0.42	£0.00	£0.06	£5.59
Whiteley Village	£0.00	£0.00	£0.00	£0.00	£0.58	£0.23	£10.48	£0.00	£16.93	£28.21
Winchester LA Total	**£51.17**	**£40.74**	**£38.20**	**£16.78**	**£32.06**	**£3.18**	**£15.50**	**£7.80**	**£27.22**	**£232.66**
Other outside Winchester	£2.69	£1.26	£12.73	£50.34	£26.23	£19.52	£26.40	£70.22	n/a	n/a
Total	**£53.87**	**£42.00**	**£50.94**	**£67.11**	**£58.29**	**£22.69**	**£41.90**	**£78.03**	**n/a**	**n/a**

Source: Tables 3B and 6B

Table 8B: **Convenience Turnover in Winchester 2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2021 £M	**£55.58**	**£43.52**	**£52.15**	**£69.68**	**£59.63**	**£24.40**	**£44.13**	**£79.58**	**n/a**	**£428.67**
Winchester Urban Area	£52.80	£42.21	£31.81	£16.72	£1.19	£0.00	£0.00	£7.96	£8.04	£160.73
Bishops Waltham	£0.00	£0.00	£0.52	£0.00	£26.83	£0.49	£0.88	£0.00	£1.51	£30.24
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£2.68	£0.00	£0.00	£0.47	£3.16
New Alresford	£0.00	£0.00	£5.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£5.49
Wickham	£0.00	£0.00	£0.00	£0.00	£1.19	£0.00	£3.97	£0.00	£0.27	£5.44
Rural Local Shops	£0.00	£0.00	£1.56	£0.70	£2.98	£0.00	£0.44	£0.00	£0.06	£5.74
Whiteley Village	£0.00	£0.00	£0.00	£0.00	£0.60	£0.24	£11.03	£0.00	£17.81	£29.68
Winchester LA Total	**£52.80**	**£42.21**	**£39.11**	**£17.42**	**£32.80**	**£3.42**	**£16.33**	**£7.96**	**£28.44**	**£240.48**
Other outside Winchester	£2.78	£1.31	£13.04	£52.26	£26.83	£20.99	£27.80	£71.63	n/a	n/a
Total	**£55.58**	**£43.52**	**£52.15**	**£69.68**	**£59.63**	**£24.40**	**£44.13**	**£79.58**	**n/a**	**n/a**

Source: Tables 3B and 6B

Table 9B: **Convenience Turnover in Winchester 2026**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2026 £M	**£59.12**	**£46.63**	**£54.73**	**£74.83**	**£62.51**	**£27.74**	**£48.57**	**£82.96**	**n/a**	**£457.10**
Winchester Urban Area	£56.17	£45.23	£33.39	£17.96	£1.25	£0.00	£0.00	£8.30	£8.54	£170.83
Bishops Waltham	£0.00	£0.00	£0.55	£0.00	£28.13	£0.55	£0.97	£0.00	£1.59	£31.79
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£3.05	£0.00	£0.00	£0.54	£3.59
New Alresford	£0.00	£0.00	£5.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£5.76
Wickham	£0.00	£0.00	£0.00	£0.00	£1.25	£0.00	£4.37	£0.00	£0.30	£5.92
Rural Local Shops	£0.00	£0.00	£1.64	£0.75	£3.13	£0.00	£0.49	£0.00	£0.06	£6.06
Whiteley Village	£0.00	£0.00	£0.00	£0.00	£0.63	£0.28	£12.14	£0.00	£19.57	£32.62
Winchester LA Total	**£56.17**	**£45.23**	**£41.05**	**£18.71**	**£34.38**	**£3.88**	**£17.97**	**£8.30**	**£30.88**	**£256.57**
Other outside Winchester	£2.96	£1.40	£13.68	£56.12	£28.13	£23.86	£30.60	£74.67	n/a	n/a
Total	**£59.12**	**£46.63**	**£54.73**	**£74.83**	**£62.51**	**£27.74**	**£48.57**	**£82.96**	**n/a**	**n/a**

Source: Tables 3B and 6B

Table 10B: **Convenience Turnover in Winchester 2031**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2031 £M	**£62.65**	**£49.71**	**£57.34**	**£80.23**	**£65.43**	**£30.98**	**£52.92**	**£86.49**	**n/a**	**£485.74**
Winchester Urban Area	£59.52	£48.21	£34.98	£19.26	£1.31	£0.00	£0.00	£8.65	£9.05	£180.97
Bishops Waltham	£0.00	£0.00	£0.57	£0.00	£29.44	£0.62	£1.06	£0.00	£1.67	£33.36
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£3.41	£0.00	£0.00	£0.60	£4.01
New Alresford	£0.00	£0.00	£5.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.30	£6.04
Wickham	£0.00	£0.00	£0.00	£0.00	£1.31	£0.00	£4.76	£0.00	£0.32	£6.39
Rural Local Shops	£0.00	£0.00	£1.72	£0.80	£3.27	£0.00	£0.53	£0.00	£0.06	£6.39
Whiteley Village	£0.00	£0.00	£0.00	£0.00	£0.65	£0.31	£13.23	£0.00	£21.29	£35.49
Winchester LA Total	**£59.52**	**£48.21**	**£43.01**	**£20.06**	**£35.98**	**£4.34**	**£19.58**	**£8.65**	**£33.29**	**£272.64**
Other outside Winchester	£3.13	£1.49	£14.34	£60.17	£29.44	£26.64	£33.34	£77.84	n/a	n/a
Total	**£62.65**	**£49.71**	**£57.34**	**£80.23**	**£65.43**	**£30.98**	**£52.92**	**£86.49**	**n/a**	**n/a**

Source: Tables 3B and 6B

Table 11B: Summary of Convenience Expenditure/Turnover 2013 to 2031 (£Millions)

	2013	2018	2021	2026	2031
Available Expenditure					
Winchester Urban Area	£154.90	£155.85	£160.73	£170.83	£180.97
Bishops Waltham	£11.58	£29.51	£30.24	£31.79	£33.36
Denmead	£2.97	£2.94	£3.16	£3.59	£4.01
New Alresford	£5.27	£5.36	£5.49	£5.76	£6.04
Wickham	£5.58	£5.20	£5.44	£5.92	£6.39
Rural Local Shops	£5.47	£5.59	£5.74	£6.06	£6.39
Whiteley	£27.24	£28.21	£29.68	£32.62	£35.49
Total	**£213.01**	**£232.66**	**£240.48**	**£256.57**	**£272.64**
Benchmark Turnover Existing Floorspace					
Winchester Urban Area	£150.07	£150.07	£150.07	£150.07	£150.07
Bishops Waltham	£5.09	£5.09	£5.09	£5.09	£5.09
Denmead	£3.20	£3.20	£3.20	£3.20	£3.20
New Alresford	£5.60	£5.60	£5.60	£5.60	£5.60
Wickham	£3.46	£3.46	£3.46	£3.46	£3.46
Rural Local Shops	£10.41	£10.41	£10.41	£10.41	£10.41
Whiteley	£28.45	£28.45	£28.45	£28.45	£28.45
Benchmark Turnover Sub-Total	**£206.28**	**£206.28**	**£206.28**	**£206.28**	**£206.28**
Benchmark Turnover Commitments					
Winchester Urban Area	£0.00	£7.03	£10.18	£10.18	£10.18
Bishops Waltham	£0.00	£28.57	£28.57	£28.57	£28.57
Denmead	£0.00	£0.00	£1.58	£1.58	£1.58
New Alresford	£0.00	£0.00	£0.00	£0.00	£0.00
Wickham	£0.00	£0.00	£0.00	£0.00	£0.00
Rural Local Shops	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley	£0.00	£0.00	£3.15	£3.15	£3.15
Benchmark Turnover Sub-Total	**£0.00**	**£35.60**	**£43.48**	**£43.48**	**£43.48**
Surplus/Deficit Expenditure					
Winchester Urban Area	£4.83	-£1.25	£0.48	£10.58	£20.72
Bishops Waltham	£6.49	-£4.15	-£3.42	-£1.87	-£0.30
Denmead	-£0.23	-£0.26	-£1.62	-£1.19	-£0.77
New Alresford	-£0.33	-£0.24	-£0.11	£0.16	£0.44
Wickham	£2.12	£1.74	£1.98	£2.46	£2.93
Rural Local Shops	-£4.94	-£4.82	-£4.67	-£4.35	-£4.02
Whiteley	-£1.21	-£0.24	-£1.92	£1.02	£3.89
Surplus/Deficit Total	**£6.73**	**-£9.22**	**-£9.28**	**£6.81**	**£22.88**

Source: Tables 5B to 10B

Table 12B: Convenience Goods Floorspace Capacity 2013 to 2031

	2013	2018	2021	2026	2031
Surplus/Deficit Expenditure					
Winchester Urban Area	£4.83	-£1.25	£0.48	£10.58	£20.72
Bishops Waltham	£6.49	-£4.15	-£3.42	-£1.87	-£0.30
Denmead	-£0.23	-£0.26	-£1.62	-£1.19	-£0.77
New Alresford	-£0.33	-£0.24	-£0.11	£0.16	£0.44
Wickham	£2.12	£1.74	£1.98	£2.46	£2.93
Rural Local Shops	-£4.94	-£4.82	-£4.67	-£4.35	-£4.02
Whiteley	-£1.21	-£0.24	-£1.92	£1.02	£3.89
Surplus/Deficit Total	**£6.73**	**-£9.22**	**-£9.28**	**£6.81**	**£22.88**
Average Sales Density (£ per Sq M Net)					
Winchester Urban Area	£12,000	£12,000	£12,000	£12,000	£12,000
Other Winchester	£5,000	£5,000	£5,000	£5,000	£5,000
Sales Floorspace Projection (Sq M Net)					
Winchester Urban Area	402	-104	40	881	1,727
Bishops Waltham	1,299	-830	-684	-373	-60
Denmead	-46	-53	-324	-238	-154
New Alresford	-66	-48	-22	32	87
Wickham	425	347	395	492	586
Rural Local Shops	-989	-964	-934	-870	-805
Whiteley	-242	-47	-383	203	777
Total	**782**	**-1,699**	**-1,913**	**128**	**2,159**
Sales Floorspace Projection (Sq M Gross)					
Winchester Urban Area	574	-149	57	1,259	2,467
Bishops Waltham	1,855	-1,186	-978	-533	-85
Denmead	-66	-75	-463	-340	-220
New Alresford	-94	-68	-32	46	125
Wickham	607	496	565	702	837
Rural Local Shops	-1,413	-1,377	-1,334	-1,242	-1,149
Whiteley	-346	-68	-547	290	1,110
Total	**1,118**	**-2,427**	**-2,732**	**182**	**3,084**

Source: Tables 11B

Appendix 3 Comparison Goods Capacity

Table 1C: Comparison Goods Retail Expenditure Per Capita (2011 Prices)

	2013	2018	2021	2026	2031
Zone 1: Winchester - West	£2,824	£3,101	£3,331	£3,834	£4,418
Zone 2: Winchester - East	£2,783	£3,056	£3,283	£3,779	£4,354
Zone 3: Outer Rural East	£3,202	£3,517	£3,778	£4,348	£5,010
Zone 4: Outer Rural West	£3,056	£3,356	£3,606	£4,150	£4,782
Zone 5: Outer Rural South East	£3,386	£3,719	£3,995	£4,598	£5,299
Zone 6: Denmead	£3,047	£3,347	£3,596	£4,138	£4,768
Zone 7: Wickham & Whiteley	£2,873	£3,155	£3,390	£3,901	£4,495
Zone 8: Eastleigh	£2,915	£3,201	£3,439	£3,958	£4,560

Sources:

Experian local estimates for 2011 comparison goods expenditure per capita

Excluding special froms of trading

Experian Business Strategies - forecast annual growth rates for 2013

Table 2C: Total Available Comparison Goods Expenditure (£M - 2011 Prices)

	2013	2018	2021	2026	2031
Zone 1: Winchester - West	£80.68	£90.21	£98.44	£116.43	£137.34
Zone 2: Winchester - East	£62.15	£69.83	£76.53	£91.16	£108.18
Zone 3: Outer Rural East	£80.82	£89.55	£96.97	£113.15	£131.96
Zone 4: Outer Rural West	£101.71	£115.53	£126.86	£151.47	£180.78
Zone 5: Outer Rural South East	£93.96	£104.03	£112.56	£131.19	£152.84
Zone 6: Denmead	£33.55	£39.43	£44.84	£56.67	£70.45
Zone 7: Wickham & Whiteley	£64.28	£73.64	£82.03	£100.38	£121.74
Zone 8: Eastleigh	£119.39	£132.04	£142.45	£165.10	£191.58
Catchment Area Total	**£636.54**	**£714.26**	**£780.67**	**£925.55**	**£1,094.86**

Sources: Table 1B and 1C

Table 3C: **Comparison Expenditure Penetration Rates and Turnover 2013 (£million)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2013	**£80.68**	**£62.15**	**£80.82**	**£101.71**	**£93.96**	**£33.55**	**£64.28**	**£119.39**	**n/a**	**£636.54**
Market Share										
Winchester other	53%	58%	35%	21%	5%	0%	1%	7%	15%	
Winchester retail warehouses	8%	7%	5%	2%	1%	0%	0%	0%	10%	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Whiteley	0%	0%	4%	0%	7%	6%	20%	2%	50%	
Winchester LA Total	**61%**	**65%**	**56%**	**23%**	**23%**	**8%**	**25%**	**9%**	**n/a**	
Other outside Winchester	**39%**	**35%**	**44%**	**77%**	**77%**	**92%**	**75%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 9	Inflow	Total
Turnover £M										
Winchester other	£42.76	£36.05	£28.29	£21.36	£4.70	£0.00	£0.64	£8.36	£25.09	£167.24
Winchester retail warehouses	£6.45	£4.35	£4.04	£2.03	£0.94	£0.00	£0.00	£0.00	£1.98	£19.80
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£6.58	£0.00	£0.64	£0.00	£0.07	£7.29
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.00	£0.00	£0.12	£0.79
New Alresford	£0.00	£0.00	£8.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£8.51
Wickham	£0.00	£0.00	£0.00	£0.00	£0.94	£0.00	£1.29	£0.00	£0.12	£2.34
Rural Local Shops	£0.00	£0.00	£1.62	£0.00	£1.88	£0.00	£0.64	£0.00	£0.08	£4.22
Whiteley	£0.00	£0.00	£3.23	£0.00	£6.58	£2.01	£12.86	£2.39	£27.07	£54.13
Winchester LA Total	**£49.22**	**£40.40**	**£45.26**	**£23.39**	**£21.61**	**£2.68**	**£16.07**	**£10.74**	**£54.95**	**£264.33**
Other outside Winchester	**£31.47**	**£21.75**	**£35.56**	**£78.31**	**£72.35**	**£30.87**	**£48.21**	**£108.64**	**n/a**	**n/a**
Total	**£80.68**	**£62.15**	**£80.82**	**£101.71**	**£93.96**	**£33.55**	**£64.28**	**£119.39**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4) adjusted to take account of Whiteley redevelopment.
Tables 2C

Table 4C: **Comparison Expenditure Penetration Rates and Turnover 2018**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2018	**£90.21**	**£69.83**	**£89.55**	**£115.53**	**£104.03**	**£39.43**	**£73.64**	**£132.04**	**n/a**	**£714.26**
Market Share										
Winchester other	55%	60%	35%	21%	5%	0%	1%	7%	15%	
Winchester retail warehouses	8%	7%	5%	2%	1%	0%	0%	0%	10%	
Bishops Waltham	0%	0%	0%	0%	10%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Whiteley	0%	0%	4%	0%	7%	6%	25%	2%	45%	
Winchester LA Total	**63%**	**67%**	**56%**	**23%**	**26%**	**8%**	**30%**	**9%**	**n/a**	
Other outside Winchester	**37%**	**33%**	**44%**	**77%**	**74%**	**92%**	**70%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 9	Inflow Expenditure	Total £M
Turnover £M										
Winchester other	£49.61	£41.90	£31.34	£24.26	£5.20	£0.00	£0.74	£9.24	£28.64	£190.94
Winchester retail warehouses	£7.22	£4.89	£4.48	£2.31	£1.04	£0.00	£0.00	£0.00	£2.21	£22.15
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£10.40	£0.00	£0.74	£0.00	£0.11	£11.25
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.79	£0.00	£0.00	£0.14	£0.93
New Alresford	£0.00	£0.00	£8.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£9.43
Wickham	£0.00	£0.00	£0.00	£0.00	£1.04	£0.00	£1.47	£0.00	£0.13	£2.65
Rural Local Shops	£0.00	£0.00	£1.79	£0.00	£2.08	£0.00	£0.74	£0.00	£0.09	£4.70
Whiteley	£0.00	£0.00	£3.58	£0.00	£7.28	£2.37	£18.41	£2.64	£28.05	£62.33
Winchester LA Total	**£56.83**	**£46.79**	**£50.15**	**£26.57**	**£27.05**	**£3.15**	**£22.09**	**£11.88**	**£59.85**	**£304.37**
Other outside Winchester	**£33.38**	**£23.04**	**£39.40**	**£88.96**	**£76.98**	**£36.27**	**£51.55**	**£120.16**	**n/a**	**n/a**
Total	**£90.21**	**£69.83**	**£89.55**	**£115.53**	**£104.03**	**£39.43**	**£73.64**	**£132.04**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4) adjusted to take account of Whiteley redevelopment.
Tables 2C

Table 5C: **Comparison Expenditure Penetration Rates and Turnover 2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2021	**£98.44**	**£76.53**	**£96.97**	**£126.86**	**£112.56**	**£44.84**	**£82.03**	**£142.45**	**n/a**	**£780.67**
Market Share										
Winchester other	55%	60%	35%	21%	5%	0%	1%	7%	15%	
Winchester retail warehouses	8%	7%	5%	2%	1%	0%	0%	0%	10%	
Bishops Waltham	0%	0%	0%	0%	10%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Whiteley	0%	0%	4%	0%	7%	6%	25%	2%	45%	
Winchester LA Total	**63%**	**67%**	**56%**	**23%**	**26%**	**8%**	**30%**	**9%**	**n/a**	
Other outside Winchester	**37%**	**33%**	**44%**	**77%**	**74%**	**92%**	**70%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow Expenditure**	**Total £M**
Turnover £M										
Winchester other	£54.14	£45.92	£33.94	£26.64	£5.63	£0.00	£0.82	£9.97	£31.25	£208.30
Winchester retail warehouses	£7.88	£5.36	£4.85	£2.54	£1.13	£0.00	£0.00	£0.00	£2.42	£24.16
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£11.26	£0.00	£0.82	£0.00	£0.12	£12.20
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.90	£0.00	£0.00	£0.16	£1.06
New Alresford	£0.00	£0.00	£9.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.51	£10.21
Wickham	£0.00	£0.00	£0.00	£0.00	£1.13	£0.00	£1.64	£0.00	£0.15	£2.91
Rural Local Shops	£0.00	£0.00	£1.94	£0.00	£2.25	£0.00	£0.82	£0.00	£0.10	£5.11
Whiteley	£0.00	£0.00	£3.88	£0.00	£7.88	£2.69	£20.51	£2.85	£30.93	£68.74
Winchester LA Total	**£62.02**	**£51.27**	**£54.30**	**£29.18**	**£29.27**	**£3.59**	**£24.61**	**£12.82**	**£65.63**	**£332.68**
Other outside Winchester	**£36.42**	**£25.25**	**£42.67**	**£97.68**	**£83.30**	**£41.25**	**£57.42**	**£129.63**	**n/a**	**n/a**
Total	**£98.44**	**£76.53**	**£96.97**	**£126.86**	**£112.56**	**£44.84**	**£82.03**	**£142.45**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4) adjusted to take account of Whiteley redevelopment.
Tables 2C

Table 6C: **Comparison Expenditure Penetration Rates and Turnover 2026**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2026	**£116.43**	**£91.16**	**£113.15**	**£151.47**	**£131.19**	**£56.67**	**£100.38**	**£165.10**	**n/a**	**£925.55**
Market Share										
Winchester other	55%	60%	35%	21%	5%	0%	1%	7%	15%	
Winchester retail warehouses	8%	7%	5%	2%	1%	0%	0%	0%	10%	
Bishops Waltham	0%	0%	0%	0%	10%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Whiteley	0%	0%	4%	0%	7%	6%	25%	2%	45%	
Winchester LA Total	**63%**	**67%**	**56%**	**23%**	**26%**	**8%**	**30%**	**9%**	**n/a**	
Other outside Winchester	**37%**	**33%**	**44%**	**77%**	**74%**	**92%**	**70%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow Expenditure**	**Total £M**
Turnover £M										
Winchester other	£64.03	£54.70	£39.60	£31.81	£6.56	£0.00	£1.00	£11.56	£36.93	£246.19
Winchester retail warehouses	£9.31	£6.38	£5.66	£3.03	£1.31	£0.00	£0.00	£0.00	£2.85	£28.55
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£13.12	£0.00	£1.00	£0.00	£0.14	£14.27
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.13	£0.00	£0.00	£0.20	£1.33
New Alresford	£0.00	£0.00	£11.32	£0.00	£0.00	£0.00	£0.00	£0.00	£0.60	£11.91
Wickham	£0.00	£0.00	£0.00	£0.00	£1.31	£0.00	£2.01	£0.00	£0.17	£3.49
Rural Local Shops	£0.00	£0.00	£2.26	£0.00	£2.62	£0.00	£1.00	£0.00	£0.12	£6.01
Whiteley	£0.00	£0.00	£4.53	£0.00	£9.18	£3.40	£25.10	£3.30	£37.23	£82.74
Winchester LA Total	**£73.35**	**£61.08**	**£63.37**	**£34.84**	**£34.11**	**£4.53**	**£30.11**	**£14.86**	**£78.25**	**£394.50**
Other outside Winchester	**£43.08**	**£30.08**	**£49.79**	**£116.63**	**£97.08**	**£52.14**	**£70.27**	**£150.24**	**n/a**	**n/a**
Total	**£116.43**	**£91.16**	**£113.15**	**£151.47**	**£131.19**	**£56.67**	**£100.38**	**£165.10**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4) adjusted to take account of Whiteley redevelopment.
Tables 2C

Table 7C: **Comparison Expenditure Penetration Rates and Turnover 2031**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2031	**£137.34**	**£108.18**	**£131.96**	**£180.78**	**£152.84**	**£70.45**	**£121.74**	**£191.58**	**n/a**	**£1,094.86**
Market Share										
Winchester other	55%	60%	35%	21%	5%	0%	1%	7%	15%	
Winchester retail warehouses	8%	7%	5%	2%	1%	0%	0%	0%	10%	
Bishops Waltham	0%	0%	0%	0%	10%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Whiteley	0%	0%	4%	0%	7%	6%	25%	2%	45%	
Winchester LA Total	**63%**	**67%**	**56%**	**23%**	**26%**	**8%**	**30%**	**9%**	**n/a**	
Other outside Winchester	**37%**	**33%**	**44%**	**77%**	**74%**	**92%**	**70%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 9	Inflow Expenditure	Total £M
Turnover £M										
Winchester other	£75.53	£64.91	£46.19	£37.96	£7.64	£0.00	£1.22	£13.41	£43.56	£290.43
Winchester retail warehouses	£10.99	£7.57	£6.60	£3.62	£1.53	£0.00	£0.00	£0.00	£3.37	£33.67
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£15.28	£0.00	£1.22	£0.00	£0.17	£16.67
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.41	£0.00	£0.00	£0.25	£1.66
New Alresford	£0.00	£0.00	£13.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£13.89
Wickham	£0.00	£0.00	£0.00	£0.00	£1.53	£0.00	£2.43	£0.00	£0.21	£4.17
Rural Local Shops	£0.00	£0.00	£2.64	£0.00	£3.06	£0.00	£1.22	£0.00	£0.14	£7.05
Whiteley	£0.00	£0.00	£5.28	£0.00	£10.70	£4.23	£30.43	£3.83	£44.57	£99.04
Winchester LA Total	**£86.52**	**£72.48**	**£73.90**	**£41.58**	**£39.74**	**£5.64**	**£36.52**	**£17.24**	**£92.96**	**£466.57**
Other outside Winchester	**£50.81**	**£35.70**	**£58.06**	**£139.20**	**£113.10**	**£64.82**	**£85.22**	**£174.34**	**n/a**	**n/a**
Total	**£137.34**	**£108.18**	**£131.96**	**£180.78**	**£152.84**	**£70.45**	**£121.74**	**£191.58**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4) adjusted to take account of Whiteley redevelopment.
Tables 2C

Table 8C: Summary of Comparison Expenditure Turnover 2013 to 2031 (£Millions)

	2013	2018	2021	2026	2031
Available Expenditure					
Winchester other	£167.24	£190.94	£208.30	£246.19	£290.43
Winchester retail warehouses	£19.80	£22.15	£24.16	£28.55	£33.67
Bishops Waltham	£7.29	£11.25	£12.20	£14.27	£16.67
Denmead	£0.79	£0.93	£1.06	£1.33	£1.66
New Alresford	£8.51	£9.43	£10.21	£11.91	£13.89
Wickham	£2.34	£2.65	£2.91	£3.49	£4.17
Rural Local Shops	£4.22	£4.70	£5.11	£6.01	£7.05
Whiteley	£54.13	£62.33	£68.74	£82.74	£99.04
Winchester LA Total	**£264.33**	**£304.37**	**£332.68**	**£394.50**	**£466.57**
Benchmark Turnover - Existing Floorspace					
Winchester other	£161.62	£178.44	£189.36	£209.07	£230.83
Winchester retail warehouses	£21.22	£23.43	£24.86	£27.45	£30.31
Bishops Waltham	£5.60	£6.18	£6.56	£7.24	£8.00
Denmead	£0.80	£0.88	£0.94	£1.03	£1.14
New Alresford	£8.40	£9.27	£9.84	£10.87	£12.00
Wickham	£2.40	£2.65	£2.81	£3.10	£3.43
Rural Local Shops	£5.20	£5.74	£6.09	£6.73	£7.43
Whiteley	£65.00	£71.77	£76.16	£84.08	£92.84
Total	**£270.24**	**£298.37**	**£316.63**	**£349.58**	**£385.97**
Benchmark Turnover - Commitments					
Winchester other	£0.00	£29.83	£33.66	£37.16	£40.63
Winchester retail warehouses	£0.00	£3.40	£3.61	£3.98	£4.36
Bishops Waltham	£0.00	£7.26	£7.70	£8.51	£9.30
Denmead	£0.00	£0.00	£0.80	£0.88	£0.97
New Alresford	£0.00	£0.00	£0.00	£0.00	£0.00
Wickham	£0.00	£0.00	£0.00	£0.00	£0.00
Rural Local Shops	£0.00	£0.00	£0.00	£0.00	£0.00
Whiteley	£0.00	£3.00	£3.98	£4.40	£4.81
Total	**£0.00**	**£43.49**	**£49.75**	**£54.93**	**£60.06**
Surplus/Deficit Expenditure					
Winchester other	£5.62	-£17.33	-£14.72	-£0.04	£18.97
Winchester retail warehouses	-£1.42	-£4.68	-£4.31	-£2.88	-£0.99
Bishops Waltham	£1.69	-£2.19	-£2.07	-£1.48	-£0.63
Denmead	-£0.01	£0.04	-£0.68	-£0.58	-£0.45
New Alresford	£0.11	£0.15	£0.37	£1.04	£1.89
Wickham	-£0.06	£0.00	£0.10	£0.39	£0.74
Rural Local Shops	-£0.98	-£1.04	-£0.98	-£0.72	-£0.37
Whiteley	-£10.87	-£12.44	-£11.40	-£5.74	£1.39
Total	**-£5.91**	**-£37.49**	**-£33.70**	**-£10.02**	**£20.55**

Sources: Tables 3C to 7C

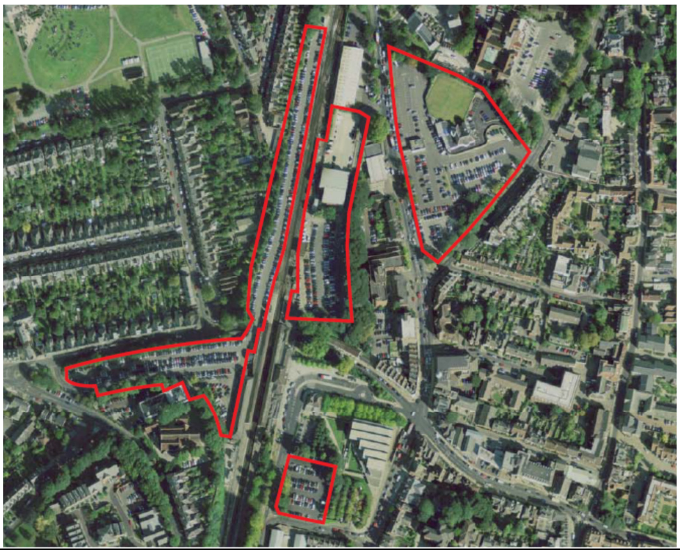
Table 9C: Comparison Goods Floorspace Capacity 2013 to 2031 (£Millions)

	2013	2018	2021	2026	2031
Surplus/Deficit Expenditure					
Winchester other	£5.62	-£17.33	-£14.72	-£0.04	£18.97
Winchester retail warehouses	-£1.42	-£4.68	-£4.31	-£2.88	-£0.99
Bishops Waltham	£1.69	-£2.19	-£2.07	-£1.48	-£0.63
Denmead	-£0.01	£0.04	-£0.68	-£0.58	-£0.45
New Alresford	£0.11	£0.15	£0.37	£1.04	£1.89
Wickham	-£0.06	£0.00	£0.10	£0.39	£0.74
Rural Local Shops	-£0.98	-£1.04	-£0.98	-£0.72	-£0.37
Whiteley	-£10.87	-£12.44	-£11.40	-£5.74	£1.39
Total	**-£5.91**	**-£37.49**	**-£33.70**	**-£10.02**	**£20.55**
Average Sales Density (£ per Sq M Net)					
Winchester other/Whiteley	£5,000	£5,520	£5,858	£6,468	£7,141
Winchester retail warehouses	£2,000	£2,208	£2,343	£2,587	£2,856
Winchester rural area	£4,000	£4,416	£4,687	£5,174	£5,713
Sales Floorspace Projection (Sq M Net)					
Winchester other	1,124	-3,140	-2,512	-6	2,656
Winchester retail warehouses	-710	-2,120	-1,840	-1,115	-348
Bishops Waltham	423	-496	-441	-287	-110
Denmead	-3	10	-146	-113	-79
New Alresford	27	35	78	202	331
Wickham	-14	-1	21	75	130
Rural Local Shops	-244	-235	-209	-138	-65
Whiteley	-2,173	-2,253	-1,947	-888	195
Surplus/Deficit Total	**-1,571**	**-8,200**	**-6,995**	**-2,270**	**2,710**
Gross Floorspace Projection (Sq M)					
Winchester other	1,498	-4,486	-3,589	-9	3,794
Winchester retail warehouses	-835	-2,494	-2,165	-1,312	-410
Bishops Waltham	605	-709	-630	-410	-158
Denmead	-4	14	-208	-161	-113
New Alresford	38	49	111	288	473
Wickham	-21	-1	30	108	186
Rural Local Shops	-349	-336	-299	-198	-93
Whiteley	-3,105	-3,219	-2,781	-1,268	279
Surplus/Deficit Total	**-2,172**	**-11,181**	**-9,529**	**-2,962**	**3,959**

Sources: *Table 8C*

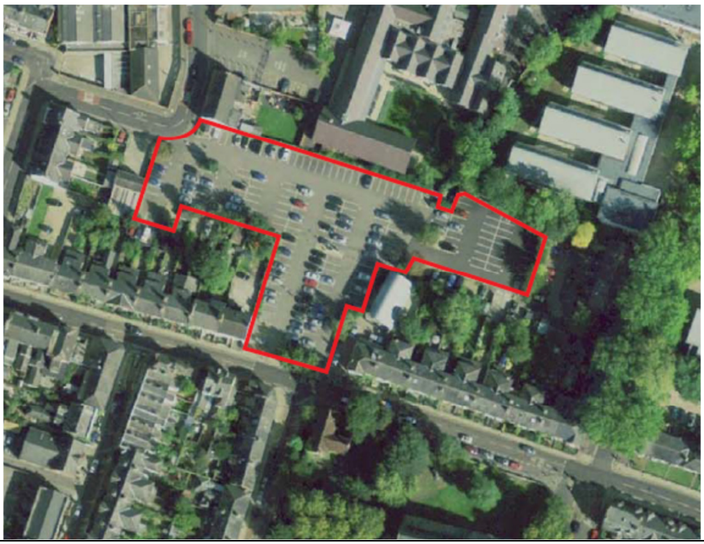
Appendix 4 – Evaluation of Sites

Site 1 - Station Approach Area, Winchester



The Station Approach area includes a group of car parks and buildings situated adjacent / near Winchester Railway Station. This area is northwest of the main town centre, 300m+ from the Primary Shopping Area. The sites are likely to represent borderline edge/out-of-centre sites in terms of retail development, although they could be part of an improved local centre around Andover Road/Stockbridge Road. The sites are subject to the Station Approach Development Assessment which recognises the scope for an element of retail development.	
Evaluation Criteria	**Comment**
Availability	Short to Medium term
Scale of Development (Retail)	Small scale local shopping facilities (around 1,000 sq. m gross at ground floor level), as envisaged in the Planning Brief.
Commercial Potential	These sites are in a peripheral location in relation to the main town centre area but benefits from a prominent position adjacent to the Railway Station and Andover Road/Stockbridge Road local centre.
Likely Type of Development	The sites could accommodate small scale retail and service uses either linked with the station or the existing local centre.
Development Constraints	Loss of car parking would need to be addressed in the parking strategy e.g. through decked car parking could be considered.
Possible Alternative Uses	Retention of existing car parks, residential, office or hotel development.
Access	Existing (separate) accesses from within urban area, although highway layout may need alterations to facilitate development.
Overall Development Prospects	Good for small scale retail uses.

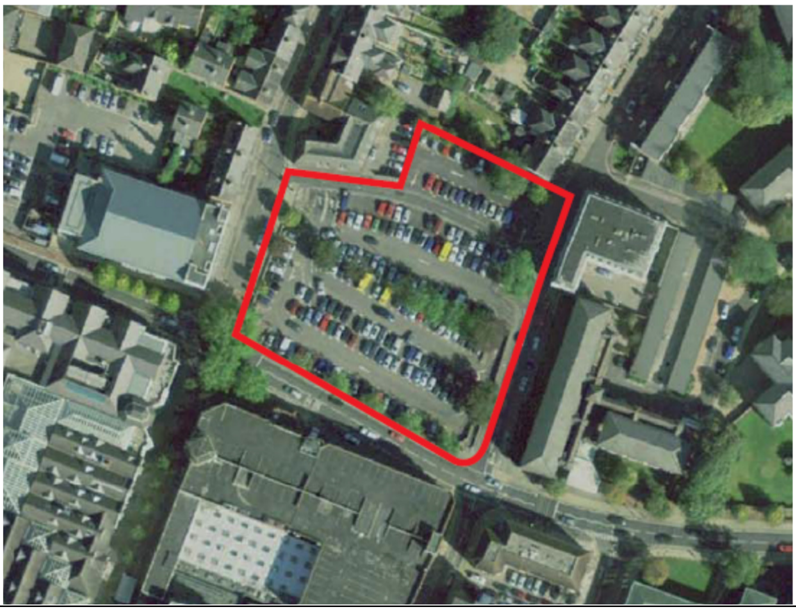
Site 2 - St. Peter's Car Park, Winchester



This surface pubic car park occupies a 'T' shaped site of approximately 0.4ha. The site is located just outside the designated Town Centre Boundary and is about 200 metres from the Primary Shopping Area. The site would represent an edge-of-centre site in terms of retail development.

Evaluation Criteria	Comment
Availability	Medium Term.
Scale of Development (Retail)	Medium scale (up to about 2,000 sq. m gross at ground floor level).
Commercial Potential	The site is in a peripheral location in relation to the main town centre commercial area and has some frontage (25 metres) on North Walls. The site could accommodate medium size format retail uses.
Likely Type of Development	Small/medium sized retail warehouses, a discount food store or commercial leisure uses. An element of the site would be retained of surface car parking.
Development Constraints	Irregular shaped site with restricted development density. Loss of pay and display car park may be undesirable. Retail development on this edge-of-centre would need to satisfy the sequential approach. Impact on nearby residential uses would need to be considered.
Possible Alternative Uses	Retention of existing public car park. Residential, office or hotel development.
Access	Existing accesses from Gordon Road and North Wall.
Overall Development Prospects	Reasonable/Poor

Site 3 – Middle Brook Street Car Park (incorporating Cossack Lane car park), Winchester



This large car park and adjacent low density building to the north occupy an area of approximately 0.6 ha. The site is located within the designated Town Centre Boundary, to the rear of the Silver Hill Development Area. The site could be developed to provide a high density mixed use development.	
Evaluation Criteria	**Comment**
Availability	Medium to long term
Scale of Development (Retail)	Large scale (up to 10,000 sq. m gross on two floors).
Commercial Potential	The site fronts Friarsgate and is in the heart of the town centre, whilst also visible from the Silver Hill development area.
Likely Type of Development	High density development with retail at ground and second floor level. The upper floors could be developed for residential or office use. Underground/or upper level car parking/servicing may be required.
Development Constraints	Replacement and additional parking may be required. Impact on nearby residential area.
Possible Alternative Uses	Retention of existing surface car park.
Access	Existing accesses from Middle Brook and Lower Brook Street.
Overall Development Prospects	Good

Site 4 - Infill Plot, Southgate Street, Winchester

This vacant plot occupies a site of approximately 400 sq. m. The site is located within the designated Town Centre Boundary and is 100 metres from the Primary Shopping Area. The site could be redeveloped to provide terraced shop units to complete the frontage.

Evaluation Criteria	Comment
Availability	Short term
Scale of Development (Retail)	Small scale (up to 500 sq. m gross on two floors).
Commercial Potential	The site is in a peripheral location in relation to the main town centre commercial area, but has good road frontage along Southgate Street. The site is in a secondary location in retail terms but could be attractive for Class A2 - A5 uses, or independent retail traders.
Likely Type of Development	Small unit shops (2 storey or with residential/offices above).
Development Constraints	The site's secondary location suggests rental value will be relatively low compared with other areas within the town centre.
Possible Alternative Uses	Residential or small scale office development.
Access	Existing access from Southgate Street.
Overall Development Prospects	Good

Site 5 - National Tyres, Southgate Street, Winchester

This tyre sales outlet occupies a site of approximately 0.2ha. The site is located within the designated Town Centre Boundary and is about 350 metres from the Primary Shopping Area.	
Evaluation Criteria	**Comment**
Availability	Medium term
Scale of Development (Retail)	Small scale (less than 1,000 sq. m gross).
Commercial Potential	The site is in a peripheral location in relation to the main town centre commercial area, but has good road frontage along Southgate Street. The site is in a secondary location in retail terms but could be attractive for ground floor retail with alternative uses above, or bulky single storey retail.
Likely Type of Development	Small unit shops (2 storey or with residential/offices above), or alternatively a large format unit with surface car parking.
Development Constraints	Availability of site uncertain.
Possible Alternative Uses	Residential or office development.
Access	Existing access from Southgate Street.
Overall Development Prospects	Reasonable

Site 6 - Chesil Street Car Park, Winchester

This medium-sized car park is situated east of the main Town Centre and Primary Shopping Area. The site does however benefit from an arterial route frontage and an adjacent multi-storey car park. The site could be developed to provide bulky goods retail uses.	
Evaluation Criteria	**Comment**
Availability	Medium Term.
Scale of Development (Retail)	Small Scale (less than 1,000 sq. m gross).
Commercial Potential	The site is in a peripheral location in relation to the main town centre commercial area, but has good road frontage along Chesil Street. The site is in a secondary location in retail terms but could be attractive for ground floor retail with alternative uses above, or bulky single storey retail.
Likely Type of Development	Small unit shops (2 storey or with residential/offices above), or alternatively a larger format bulky retail unit.
Development Constraints	Replacement and additional parking may be required. Impact on nearby residential area.
Possible Alternative Uses	Retention of existing surface car park.
Access	Existing Access from Barfield Close.
Overall Development Prospects	Reasonable

Site 7 - The Dean, New Alresford

The Dean employment uses occupy a site of approximately 0.7ha. The site is located just outside the Designated Centre Boundary, but is about 60 metres from the Primary Shopping Area. The site would represent an edge-of-centre site in terms of retail development.

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development (Retail)	Large scale (up to 2,500 sq. m gross)
Commercial Potential	The site is peripheral to the main shopping area (West Street) but has good road frontage on to The Dean.
Likely Type of Development	It could be occupied by large space user (retail warehouse store, medium sized food store or leisure use).
Development Constraints	Availability of site is uncertain and may be in multiple ownerships. Existing uses may need to be relocated and the cost of this may preclude development. Loss of employment land may be unacceptable. Development on this edge-of-centre site would need to satisfy the sequential approach.
Possible Alternative Uses	Retention of employment uses or residential development.
Access	Existing access from The Dean.
Overall Development Prospects	Reasonable

Site 8 - Fire Station, New Alresford

The fire station occupies a site of approximately 0.15ha. The site is located just outside the designated Centre Boundary, but is 100 metres from the Primary Shopping Area. The site may represent an edge-of-centre site in terms of retail development.

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development (Retail)	Small scale (up to 500 sq. m gross at ground floor level)
Commercial Potential	The site is in a peripheral location in relation to the main town centre commercial area, but has main road frontage on Pound Hill.
Likely Type of Development	Medium format retail unit with surface car park or a parade of approx. 5 units.
Development Constraints	Availability of site uncertain and Fire Station would need to be relocated. Retail development on this edge-of-centre would need to satisfy the sequential approach.
Possible Alternative Uses	Retention of Fire station. Residential or office development.
Access	Existing access from Pound Hill.
Overall Development Prospects	Reasonable (Subject to satisfying the sequential approach and relocation of the fire station)

Site 9 - Post Office Depot / Telephone Exchange, New Alresford

New Alresford Post Office has buildings to the rear, and if assembled with units on the corner of West Street and Station Road could create a site of about 800 sq. m.	
Evaluation Criteria	**Comment**
Availability	Medium to long term.
Scale of Development (Retail)	Small scale (about 500 sq. m gross increase in floorspace).
Commercial Potential	This site is located in the heart of the town centre and forms part of the Primary Shopping Area.
Likely Type of Development	The site could be redeveloped to provide a courtyard of small shop units leading off West Street.
Development Constraints	Availability of PO premises uncertain and may need to be relocated which may preclude redevelopment. Building fronting West Street may need to be retained.
Possible Alternative Uses	Retention of existing PO use or residential development.
Access	Existing service access from Station Road, and pedestrian access from West Street.
Overall Development Prospects	Reasonable.

Site 10 - Malt Lane Area, Bishop's Waltham

This site is allocated in the Local Plan (S.2) for mixed use development, which may include housing, small scale retail development, service uses and car parking, allowing for the relocation of existing uses (clinic and garden machinery use) on the site where necessary. The overall area is approximately 0.25ha.

Evaluation Criteria	Comment
Availability	Short to medium term.
Scale of Development (Retail)	Small scale (up to 1,000 sq. m gross at ground floor level).
Commercial Potential	Within the centre boundary and adjacent to the Primary Shopping Area. The site has good road frontage on to the B2177 and is opposite the Budgens food store.
Likely Type of Development	Up to 10 small shop units fronting on to the B2177, with residential above and/or to the rear. The clinic use could also be re-housed on the site.
Development Constraints	Requirement to re-house or relocate existing uses.
Possible Alternative Uses	Retention of existing uses or residential development.
Access	Existing access from Malt Lane.
Overall Development Prospects	Good.

Site 11 - Social Club and Car Parks, Bishop's Waltham

The Social Club is located in the centre of the main centre car park and occupies an area of about 400 sq. m. The site could be redeveloped to provide additional retail units fronting on to Houchin Street with an adapted car parking layout.	
Evaluation Criteria	**Comment**
Availability	Medium term.
Scale of Development (Retail)	Small scale (less than 500 sq. m gross).
Commercial Potential	Located in the heart of the centre therefore relatively attractive commercially.
Likely Type of Development	Redevelopment for additional retail units (perhaps with residential use above).
Development Constraints	Availability of site uncertain and social club may need to be relocated. Building is within a conservation area and may be of historic importance. Need to re-configure/replace car parking.
Possible Alternative Uses	Retention of social club.
Access	Existing access from Houchin Road and car park.
Overall Development Prospects	Reasonable

Site 12 - Kidmore Lane Car Park, Denmead

This surface car park appears to be under-used and peripheral from the primary shopping area. It occupied a site of about 0.15ha	
Evaluation Criteria	**Comment**
Availability	Short term.
Scale of Development (Retail)	Small scale (up to 800 sq. m gross).
Commercial Potential	Within the centre boundary but about 70 metres from the Primary Shopping Area, but has road frontage on the B2150.
Likely Type of Development	Small shop units on the front of the site with residential development to the rear. Or the development of a small food store up to 800 sq. m gross.
Development Constraints	Loss of car parking. Need to relocate or re-house public toilets.
Possible Alternative Uses	Retention of car park or residential development.
Access	Existing access from Kidmore Lane.
Overall Development Prospects	Good.

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