`Carter Jonas

Basingstoke & Deane Retail Capacity *Refresh 2015*:

FINAL REPORT

28th August 2015

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Basingstoke & Deane Retail Capacity *Refresh 2015*

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1.0 INTRODUCTION

1.1 Carter Jonas has been instructed by Basingstoke & Deane Borough Council to carry out a *'refresh'* of the Council's previous evidence-based retail capacity studies published in 2008, 2009, and 2012[1].

1.2 The retail capacity '*refresh*' was commissioned by the Council to provide further evidence in the preparation of the Basingstoke and Deane Borough Local Plan Public Examination in October 2015.

1.3 The '*refresh*' takes into account the changes in national and local planning policy and other material considerations since 2012; when the *2012 Retail Study Update* was prepared. This includes the *National Planning Policy Framework* (NPPF, March 2012) and *National Planning Practice Guidance* (NPPG, March 2014); both of which set out the Government's key objective of sustainable economic development and, as an important part of this, ensuring the vitality and viability of town centres.

1.4 The '*refresh*' also takes into account the significant changes that have occurred in the national and local retail property market since 2012. For example, the updated capacity forecasts take into account the impact of the economic recession and internet shopping on retail expenditure forecasts. The 'refresh' also takes into account of retail proposals and that have been permitted and/ or have opened across the Borough since 2012, principally:

- A new John Lewis and Waitrose store at Basing View (reference: 13/00195):
- A new Lidl store at Reading Road (reference: BDB/75973);
- A new Dunelm Mill store at Reading Road (reference: BDB/75973);
- A new Majestic Wines store at New Road (reference: BDB/74185);
- A new Co-op store at Park Prewett Local Centre (reference: BDB/63416);
- A new Budgens store at Kingsclere Service Station (reference: 14/00517): and
- Other new local convenience and comparison goods floorspace at various other locations.

1.5 It should be noted at the outset that this '*refresh*' does not provide a full and comprehensive review and update of the Council's previous retail and town centre studies. For example, this '*refresh*' draws on the results of the Household Telephone Interview Survey (HTIS) conducted to help inform the *2012 Retail Study Update*, and it does not therefore reflect the likely changes in shopping patterns, expenditure flows and market shares that will have inevitably occurred over the last three years due, in

[1] The *2008 Retail Study and 2009 and 2012 Updates were* originally prepared by Strategic Perspectives LLP – now part of Carter Jonas LLP.

part, to the impact of new retail investment and development in competing shopping locations and also the growth of internet shopping. We therefore advise Basingstoke and Deane Borough Council that they should updated the household survey for any future update on retail capacity.

1.6 Notwithstanding this important caveat, this capacity 'refresh' is based, as far as possible, on most robust and reliable data and forecasts available[2], accepted published sources used for retail planning assessments, as well as evidence provided by the local planning authority.

1.7 For ease of reference this study is set out in the following sections:

- **Section 2:** describes CJ's **CREAT^{e}** Capacity Model approach and identifies the key assumptions and forecasts that underpin the model;
- **Section 3:** describes the key outputs of the capacity forecasts for convenience and comparison goods retailing; and
- **Section 4:** summarises the key findings of the capacity 'refresh'.

[2] This includes the latest forecasts published by Experian in *Retail Planner Briefing Note 12* (October 2014).

2.0 CREATE MODEL: BASELINE EVIDENCE & FORECASTS

2.1 This section sets out the baseline assumptions and forecasts that underpin the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in Basingstoke and Deane Borough Council over the development plan period.

2.2 This '*refresh*' updates and supersedes the findings of the previous evidence-based studies prepared for the planning authority to help inform plan-making and decision-taking at the local level.

THE CREATE MODEL: APPROACH

2.3 As described in Section 1, CJ's *Retail and Town Centre Consultancy* team has developed the **CREAT^{e}** economic model over a number of years to specifically assess the capacity for, and impact of, new convenience and comparison goods retail floorspace on existing centres, stores and shopping locations.

2.4 The Excel-based model adopts a transparent '*step-by-step*' goods-based approach in which all the key assumptions and forecasts can be easily interrogated and tested. It has been developed in accordance with best practice, and takes into account the most recent advice and impact 'checklist' set out in the Government's *National Planning Practice Guidance* (NPPG) on '*Ensuring the Vitality of Town Centres*' (paragraphs 017-018).

2.5 Although it is accepted that retail planning assessments generally rely on a series of informed judgements to assess the likely turnover, trade draw and impact of new developments, one of the main advantages of the '*step-by-step*' approach is that it: enables the judgements and factors underlying them to be fully explained and tested.

2.6 The key steps in the **CREAT^{e}** retail capacity model are as follows:

- **Step 1:** define an appropriate catchment/study area and, where relevant, subdivide the catchment into zones based on postcode sectors to help facilitate the broad assessment of current shopping patterns and expenditure flows based on survey evidence (where available).
- **Step 2**: establish the base year and price year, and agree the appropriate timeframe for assessing capacity ('design years') in accordance with advice set out in the NPPF and NPPG.
- **Stage 3**: establish the broad nature of current shopping patterns and expenditure flows, preferably based on household telephone interview surveys, and identify the main existing centres and shopping locations to be assessed.
- **Step 4**: determine the population and expenditure per capita levels within the catchment area and defined zones to identify the total available retail expenditure

at the base year. At this stage an allowance is generally made for Special Forms of Trading (SFT), which includes all non-store sales (i.e. purchases made via the internet, mail order, TV, catalogue shopping, etc.).

- **Step 5**: project forward the likely growth in population and expenditure per capita levels using accepted sources to identify the total available expenditure at the design year(s) for impact testing.
- **Step 6**: identify the base year 'market shares' for different types of comparison (non-food) and convenience (food) goods shopping across the catchment and main study zones based on the survey evidence, where available.
- **Step 7**: allocate the available expenditure in the study area and zones based on the (survey-based) market shares to the identified centres, stores and shopping locations at the base year.
- **Step 8**: project forward the expenditure allocated to the main centres, stores and shopping locations over to the forecast years based on a standard '*constant market share approach*'.
- **Step 9**: assess the potential '*inflow*' (trade draw) of expenditure from outside the defined study area to the main centres, stores and shopping locations, where relevant, to identify their *'potential'* turnovers. The assessment of '*inflow*' is necessarily based on informed judgements drawing on other evidence-based studies and retail assessments, where available.
- **Step 10:** identify all commitments in the defined catchment/study area (i.e. retail floorspace with planning permission, under construction and/or opened since the baseline survey evidence was conducted). Assess the likely turnover and trade draw of the commitments from within and outside the catchment area.
- **Step 11:** in simple terms the forecast economic capacity for new retail floorspace is broadly derived from the forecast growth in population and expenditure, after making an allowance for new commitments, and the increased '*productivity*' (or 'efficiency') of all existing and new floorspace.
- **Step 12:** in certain cases additional capacity for new retail floorspace may also arise where there is a clearly identified "*imbalance*" (or *"over-trading"*) between the '*benchmark*' turnovers of existing centres, stores and/or shopping locations at the base year, and the total available expenditure in the defined study/catchment area[3].

3 Overtrading normally manifests itself at the local level in terms of pedestrian and car park congestion, long queues at checkouts, congestion in aisles, etc.

THE CREATE MODEL: THE EVIDENCE BASE

2.7 The assumptions and forecasts underpinning the **CREAT^e** model are based on robust evidence, research and best practice. For example:

- The 'base year' for the capacity assessment is 2015 and the forecast years for assessing capacity are 2017, 2022, 2027, 2029, and 2031.
- The base year population figures have been sourced from our in-house Experian *MMG3 Geographic Information System* (GIS) MMG3, which is an accepted source for retail planning assessments. Experian's base year populations are derived from the latest ONS 2012-based Sub-National Population Projections.
- The projections to 2031 are also sourced from the MMG3 GIS and are based on Experian's '*demographic component model*', which takes into account age, gender, birth rates, ageing, net migration and death rates.
- The average retail (convenience and comparison goods) expenditure per capita levels by zone at the base year have been derived from Experian's MMG3 GIS (please note all expenditure and turnover figures are expressed in 2013 prices).
- The annual growth forecasts for (convenience and comparison goods) expenditure per capita have been informed by Experian's October 2014 *Retail Planner Briefing Note 12* (RPBN 12)
- The market shares for 'non-store' retail sales (otherwise referred to as *Special Forms of Trading*, including Internet sales) have been deducted from the expenditure per capita figures at the base year and over the forecast period in accordance with standard practice. The SFT market shares have been sourced from Experian's latest RPBN 12 and are based on data published by the Office for National Statistics (ONS).
- The increased 'productivity' of existing and committed retail (convenience and comparison goods) floorspace over the forecast period is informed by Experian's *Retail Planner Briefing Note 12.1: Addendum* (October 2014).

2.8 The capacity forecasts are intended to enable Basingstoke and Deane Borough Council to assess the broad strategic options for the spatial distribution of new retail-led development over the plan period, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF. The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

2.9 However it is important to restate at the outset that the capacity forecasts should be treated with caution for a number of reasons. First, in this case, the capacity assessment is not based on an up-to-date household survey. This will be needed to help identify current shopping patterns and preferences for different types of food and non-food shopping across the Borough. Second, the longer terms forecasts could be subject to significant change due to the impact of economic, demographic and market trends.

2.10 As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a five year period (see NPPG, para 003). Notwithstanding this, Basingstoke and Deane Borough Council will need to take account of the forecast capacity for new retail floorspace up to 2029 as part of their plan-making. This is because the NPPF (para 23) states that local planning authorities should meet the need for retail and town centre uses in full.

THE STUDY / CATCHMENT AREA

2.11 The study/catchment area is the same as defined for the Council's previous evidence-based studies and is reproduced in **Appendix 1** to this study.

2.12 The defined study area was agreed with BDBC at the outset and is set out in **Appendix 1**. It includes almost all of the borough area, as well as areas outside of the local authority area from where Basingstoke Town and the other main centres may influence shopping patterns. The study area has been further broken down into ten zones using postcode sector geography, based on the location of major urban settlements and concentrations of population.

2.13 Zones 1-4 have been grouped together to form the 'Central Catchment Area' (CCA) for the purpose of the market share analysis and economic capacity assessment 'refresh'. The CCA is the area where most of the Borough's convenience and comparison goods floorspace is concentrated. It therefore represents the primary catchment area for the majority of the centres and stores in the CCA.

2.14 The shopping patterns, retail expenditure flows and market share assessments for both convenience and comparison goods retailing that underpin the **CREAT^{e}** model approach have been informed by a telephone interview survey of 1,002 households conducted to inform the preparation of the *2012 Retail Study Update*.

POPULATION AND EXPENDITURE FORECASTS

Population Projections

2.15 Table 1 (**Appendix 2**) sets out the base year population for the study area and ten study zones. It shows that there are estimated to be some 227,694 people living in the defined study area at 2015. Just over half (117,246) of the study area population reside within the Central Core Catchment Area (Zones 1-4), which broadly correlates to the Borough's administrative boundary. Looking at each zone, those that comprise urban areas such as Zone 2 (Basingstoke West) and Zone 3 (Basingstoke East) have a higher population (42,927 and 34,103, respectively). Zone 10 (Basingstoke North East) has the lowest population figure of 8,300, which reflects the rural nature of this zone.

2.16 As described previously, the population projections have been sourced from our in-house Experian-based MMG3 GIS demographic model. Experian's projections show a total population growth of +13.6% (+30,981) across the Study Area to 258,675 by 2031.

2.17 It should be noted that Experian's population projections (based on the ONS 2012-based SNPP) represent a higher rate of population growth and household formation than assumed in the Submitted (including main modifications) Local Plan housing requirement of 850 dwellings per annum. The capacity forecasts may therefore slightly underestimate the potential for new retail (convenience and comparison goods) floorspace over the forecast period.

Expenditure per Capita Levels

2.18 Table (**Appendix 2** and **3**) set out the average expenditure per capita estimates for convenience goods and comparison goods respectively in 2015 across the ten study zones. As described above, the 2015 average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS.

Special Forms of Trading (SFT)

2.19 In accordance with good practice an allowance has been made for the market share of *Special Forms of Trading* (SFT)[4] at the base year and over the forecast period.

2.20 Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2014) value of internet sales is £37.2bn (current prices) and other (non-internet) SFT sales stand at approximately £8.3bn. This results in total SFT sales of £45.5bn in 2013, which represents a circa 165% increase from £17.1bn recorded in 2006. Overall the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 13% in 2014. This significant growth has been fuelled by internet shopping, which had increased its share of total retail sales from 4.7% in 2008 to 10.6% in mid-2014.

2.21 Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street. However this does not mean that

4 SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

other comparison goods categories are immune to the impact of the internet, including clothing and footwear.

2.22 The table below sets out Experian's latest forecasts of the growth in the total market share of SFT between 2015 and 2031, based on retail spending growth assumptions and predictions as to the future take-up and expansion of internet shopping[5].

Table 2.1 Forecast growth in SFT's (%) market share of total retail sales

	2015	2017	2022	2027	2029	2031
Convenience Goods	9.4	11.1	15.2	17.0	17.7	18.5
Comparison Goods	16.6	18.6	21.4	21.1	20.9	20.7

Source: Experian Retail Planner Briefing Note 12 (October 2014), Appendix 3

2.23 EBS forecast that non-store retailing will continue to grow rapidly over the short to medium term, outpacing traditional forms of retail spending. They predict that this growth will be sustained by new technology (such as browsing and purchasing through mobile phones and tablets) and the development of interactive TV shopping, but will slow after 2021.

2.24 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('*bricks-and-mortar*') retail space, rather than from '*virtual*' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares to reflect the proportion of internet sales sourced from existing stores.

Table 2.2 Adjusted forecast growth in SFT's (%) market share of total retail sales

	2015	2017	2022	2027	2029	2031
Convenience Goods	2.8	3.30	4.9	5.1	5.3	5.6
Comparison Goods	11.7	14.0	16.0	15.8	15.7	15.5

Source: Experian Retail Planner Briefing Note 12 (October 2014), Appendix 3

2.25 We have used the adjusted SFT market shares set out in Experian's RPBN 12 for the purpose of this 2015 retail capacity '*refresh*'.

Expenditure Per Capita Growth Forecasts

2.26 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less

[5] Please note that although no official data is available for convenience and comparison goods, EBS have provided their own market share estimates.

expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices).

2.27 The predicted growth in average convenience and comparison expenditure per capita levels up to 2031 assumed for the purpose of the retail capacity assessment has been informed by the forecasts set out in Experian's latest *Briefing Note 12 (*October 2012).

Table 2.3 Forecast year-on-year (%) growth in retail expenditure per capita

Volume Growth per head (%):	2013	2014	2015	2016	2017-2020	2021	2022-2031
Convenience Goods	-0.5	0.5	0.4	0.6	0.6	0.6	0.6
Comparison Goods	4.6	5.6	4.4	3.1	3.1	3.1	3.3

Source: Experian Retail Planner Briefing Note 12 (October 2014); Figures 1a and 1b.

2.28 For convenience goods Experian forecast positive growth of +0.6% per annum on average from 2016 onwards. This is above previous historic long term trends of around +0.2% per annum.

2.29 For comparison goods Experian forecast that annual growth rates will average +3.1% per annum for the period 2016 to 2021, and will increase to +3.3% per annum thereafter. It should be noted that this forecast growth is well below historic 'ultra-long' (1973-2013) and 'medium' (1993-2013) term trends of between 4.5% and 5.9% per annum.

2.30 In summary, although there are positive signs of improvement in the UK economy and retail sales in 2014/15, it is clear that consumer/business confidence and the retail sector remain highly vulnerable to changes in the UK economy (such as, for example, the predicted rise in interest rates from 2016 onwards). As Experian explain in RPBN12, the lower forecast growth over the longer term compared with historic trends reflects a number of key drivers, including less expansionary consumer credit, slower overall economic growth and an ageing population.

Total Available Expenditure

2.31 Tables 4 (Appendix 2 and 3) set out the total growth in convenience and comparison goods retail expenditure in the study area and ten zones[6]. The forecasts show:

- a +23.5% (+£115.6m) growth in total **convenience goods** expenditure, from £492.2m in 2015 to £607.8m by 2031; and
- a higher +81.1% (+£653.3m) growth for **comparison goods**, from £805.1m in 2015 to £1,458.4m by 2031.

2.32 The forecasts show that the growth in comparison goods expenditure significantly outstrips convenience goods spend up to 2031. This effectively means that there

6 The total available retail expenditure is derived by multiplying the population (Table 1) and average expenditure per capita (Table 2 and 3) levels together.

should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods retailing, although this will depend on the number, location and scale of new commitments in the study area.

MARKET SHARE ANALYSIS

2.33 Table 4 sets out the baseline (%) market share analysis for all convenience goods (**Appendix 2**) and comparison goods (**Appendix 3**) shopping purchases (excluding SFT) across the study area and ten zones at 2015[7].

2.34 For convenience and comparison goods the baseline market shares show:

- **Basingstoke Town Centre** attracts a market share of 5.5% of total Study Area convenience goods expenditure; increasing to 9.9% for convenience expenditure in the CCA. The market share is lower than other centres (e.g. Chineham and Brighton Hill), partly due to a lack of major food retailers located within the centre. Basingstoke's market share is higher for comparison goods expenditure; accounting for 37.9% of total Study Area expenditure (or 47%) for the CCA.
- **Chineham District Centre** attracts the highest market share for food shopping in the Borough at 12.7% of total Study Area expenditure or 19.6% for the CCA. The majority of expenditure is directed to the Tesco store, which attracts the highest market share for convenience expenditure of all stores in the Borough (11.3% for the Study Area and 17.3% for the CCA). Comparison goods market share is considerably lower (3.9% for the Study Area and 5.5% for CCA) and reflects the limited non-food retail offer in the centre.
- **Brighton Hill District Centre** also has strong market share for convenience (8.9% for the Study Area and 15.6% for the CCA), which is directly associated with the Asda store. Like Chineham, the centre attracts a much lower market share for comparison goods expenditure (2.3% for the Study Area and 3.9% for CCA). Again, this reflects the limited non-food retail offer in the centre.
- **Whitchurch, Tadley and Overton District Centres** are achieving relatively low market shares for both convenience and comparison goods retailing. These centres predominantly serve the more frequent day-to-day needs of their local catchment populations.

2.35 It should be noted that the planned opening of major retail commitments in the Borough will alter the distribution of expenditure to some extent. This is particularly the case for the planned opening of a John Lewis at Home at Basing View. It is likely that comparison expenditure retention will increase as a result of the claw back of

7 As stated previously, in the absence of a more up-to-date evidence base, the market shares have been derived from the household survey originally conducted to inform the 2012 Retail Study Update. For the purpose of this assessment it has therefore necessarily been assumed that there have been no significant changes in the market share patterns for both convenience and comparison goods retailing since the original survey was conducted.

leaked expenditure to competing centres outside of the Borough. However, at the same time there is potential for expenditure to be drawn from stores in Basingstoke Town Centre and the District Centres; thereby potentially reducing their market share for comparison goods expenditure.

2.36 Other stores that have opened since the household survey was completed include the B&M Homestore at Worting Road, Dunelm Mills and Lidl at Gastons Wood. These out of centre stores are also likely to have impacted on the market share of the Borough's centres.

2.37 The next key step in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres, stores and floorspace based on the survey-derived market shares (%). The current '*baseline*' (2015) trading performance of the main centres and stores is set out in Table 5 for convenience (**Appendix 2**) and comparison (**Appendix 3**) goods retailing. It should be noted that no allowance is made at this stage for the potential "*inflow"* (trade draw) of expenditure to centres and stores from outside the defined Study Area.

2.38 For both convenience goods (**Appendix 2**) and comparison goods (**Appendix 3**) the expenditure (£ million) allocated to the main centres and stores at 2017 (Table 6), 2022 (Table 7), 2027 (Table 8), 2029 (Table 9), and 2031 (Table 10) assume no changes in market shares over the forecast period. This *'constant market share approach'* is widely used and accepted for strategic retail assessments. However, the Council will be aware that it is a highly theoretical approach as it does not, for example, take account of the potential impact of new retail investment and development (both within and outside the Borough) on existing shopping patterns and market shares over time.

'INFLOW' AND BASE YEAR TURNOVER ESTIMATES

2.39 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores in Basingstoke and Deane Borough we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the Study Area (see Table 11, **Appendix 2 and 3**).

2.40 In the absence of detailed published turnover and trade draw information at the local level, our judgements have been informed by previous studies and retail assessments, as well as the survey and health check evidence. The '*inflow*' assumptions also take account of:

- the scale, offer and location of all existing centres and stores in the Borough;
- the likely extent of their catchment areas;

- the competition from centres, stores and shopping facilities outside the Borough and the wider Study Area; and
- the likely retail expenditure derived from people who live outside the Study Area (including visitors and commuters) to main centres and stores in the Borough.

2.41 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that the main town centres do, to vary degrees, draw a certain proportion of their shoppers and trade from outside the defined Study Area.

RETAIL COMMITMENTS

2.42 Tables 1 and 2 (**Appendix 4**) sets out retail schemes identified by Basingstoke and Deane Borough Council that have either been opened, are under construction or had planning permission at the time of preparing this retail capacity '*refresh*'. They include the following schemes:

John Lewis at Home and Waitrose, Basing View (LPA ref: BDB/13/01985)

2.43 Permission was granted by Basingstoke and Deane Council in December 2013 (reference 13/001985) for the redevelopment of land previously used for employment uses for a John Lewis at Home store Waitrose foodstore. The scheme is located out of centre and is known as 'Basing View'.

2.44 The John Lewis at Home and Waitrose stores will sit within a single unit that also includes a shared customer café and other customer services. The John Lewis store has a net sales area of 4,422m^2 for sale of homewares, furniture, furnishings and electrical goods.

2.45 The Waitrose store has a net sales area of 2,385m^2, all of which is for the sale of convenience goods.

2.46 **Appendix 4** sets out our forecasts of the likely convenience and comparison goods turnover based on assumptions as to the likely average sales densities for each store.

2.47 Our forecasts show that the John Lewis at Home store could achieve a comparison goods turnover of £13.7m in 2015 and a convenience goods turnover of £29.8m for the Waitrose store. The turnover of both stores is based on sales densities applied by CBRE in their supporting Retail Statement, which broadly reflects company averages identified by Mintel Retail Rankings.

Dunelm and Lidl stores, Gastons Wood (LPA ref: BDB/75973)

2.48 Planning permission was granted for a Lidl foodstore and Dunelm Mills store at Reading Road in June 2012 (reference BDB/75973). Both stores have been trading since 2014.

2.49 The Dunelm Mill store has a gross floor area of 3,712m^2, which includes mezzanine floor (1,674m^2 gross). The total net sales area is 2,970m^2. The store offers a range of bulky comparison goods and ancillary non-bulky comparison goods (e.g. decorative items and household textiles).

2.50 The Lidl store has a gross floor area of 1,458m^2 with a net sales area of 1,063m^2. Of the total net sales area 80% (798m^2 net) is for the sale of convenience goods and the remainder (265m^2 net) for comparison goods.

2.51 **Appendix 4** sets out our forecasts of the likely convenience and comparison goods turnover of the proposed stores based on assumptions as to the likely average sales density for each store.

2.52 We estimate that the Dunelm Mill store could achieve a comparison goods turnover of £7.1m in 2015 based on a sales density of £2,400 per m^2.

2.53 The Lidl store's total turnover is estimated at £4.3m comprising a convenience goods turnover of £3.1m and £1.2m for comparison goods. The sales densities are informed by Mintel Retail Rankings (2013/14) and estimates used for comparable schemes.

B&M Homestore, Worting Road (LPA ref: BDB/75383).

Planning permission was granted for the B&M Homestore at Worting Road in February 2012 (reference BDB/75383). The store is located out of centre and sits within the Thorneycroft Industrial Estate, which includes a number of other retailers and trade counters including Halfords, Bathstore, Screwfix and Andrew Page. The store has a gross floor area of 2,859m^2 equating to a net sales are of 2,000m^2. A minimum of 90% (1,800m^2 net) of the total net sales are is for the sale of comparison goods with the remainder (200m^2 net) for convenience goods.

2.54 The store has originally identified as committed floorspace in the *2012 Retail Study* Update. The sales density for the store (£2,100) has been updated to reflect more up to date company average turnover data derived from Mintel Retail Rankings (2013/14) and similar schemes (as shown in **Appendix 4**). This equates to a total store turnover of £3.2m in 2015.

2.55 The Council has also identified the following other commitments that we have necessarily reviewed for the purpose of this retail capacity '*refresh*':

- Permission was granted in 2006 for a local convenience store (Co-op), which forms part of a major housing development at Park Prewett - completed in 2014. The gross floor area of the store is 967m^2, gross; equating to a sales area of 677m^2 (assuming 70% of gross) (BDB/70144).

- Planning permission was granted for a local convenience store, which forms part of a wider housing development at Merton Rise (BDB/73174). The store has a gross floor area of 300m^2 with a net sales area of 210m^2 (assuming 70% of gross).

- Planning permission was granted for new retail floorspace at Taylors Farm including 300m^2 gross convenience store (210m^2 net sales) and 147m^2 gross (103m^2 net sales) for comparison goods floorspace.
- Planning permission was granted for the development of a retail unit on the former fire station site at New Road in May 2011, which is now occupied by Majestic Wines (reference: BDB/74185). The unit has a gross floor area of 307m^2 with a net sales area of 215m^2 (assuming 70% of gross).
- Planning permission was granted for a mixed use scheme on Victoria Street (reference: BDB/74636). The scheme includes a hotel with retail accommodation on the ground floor. We have assumed that the 400m^2 gross of retail space will accommodate a comparison good retailer(s). The net sales area is 280m^2 – assuming 70% of gross.
- Planning permission was granted for a garden centre at East Woodhay (reference: BDB/73468) and a plant nursery at Lasham, near Alton (reference: BDB/73590).
- A small quantum of committed bulky goods/ showroom floorspace is also identified for at 26 Eagle Court (reference: BDB/13/01184) and Stroudley Road (reference: BDB/77396).

2.56 The assessment does not take account of committed floorspace where the planning permission has expired. This includes the planning consent for a B&Q at Winchester Road and permission for additional floorspace at an existing garden centre at Wildmoor Lane (Wyevale Garden Centre).

VACANT FLOORSPACE

2.57 A review of vacant units in Basingstoke Town Centre identifies 57 vacancies comprising 11,580m^2 gross of total vacant floorspace. The proportion of vacant units equates to 12.7% of total units in the town centre. This is above Experian Goad's average for town centres in the UK (11.5%).

2.58 The majority of vacancies are concentrated in Festival Place Shopping Centre, particularly along Queen Anne's Walk and Kensington House. Some of the vacancies are a result of 'high street' retailers that have gone into administration (e.g. Jane Norman formerly occupied Unit 33) and major retailers who have reduced their store portfolio (e.g. Mamas & Papas formerly occupied Unit 21 Wesley Walk).

2.59 It is noted that the many of the vacancies along the traditional shopping streets (e.g. Church Street and Wote Street) comprise smaller units that are typically more difficult to let, particularly to major 'high street' operators.

2.60 However, the survey identifies a number of units that have the potential to be reoccupied and contribute to meeting forecast capacity for comparison goods floorspace.

2.61 The below table highlights prime vacant retail floorspace located within Festival Place. It includes larger format single retail units as well as clusters of vacant units that have the potential for reconfiguration to form larger floorplate(s). Therefore, we consider this floorspace should be tested within the retail capacity assessment with the potential to absorb some forecast comparison good floorspace capacity.

Table 2.4: Prime vacant retail floorspace – Festival Place

Address	Floorspace (m^2)	
	Gross	Net sales
Vacant unit, Chiswick House (next to Poundland)	790	553
Units 71, 72a-77c Queen Anne's Walk	790	553
Units 56-58 Queen Anne's Walk	630	441
14-16 Chelsea House	460	322
Unit 14 Wesley Walk	200	140
Unit 21 Wesley Walk	260	182
Units 4-6, 9-8, 11-12, 14-16, & 18 Kensington House	1,140	798
Total	**4,270**	**2,989**

Source: Experian Goad June 2014

Note: Vacant units/ floorspace was updated by BDBC in August 2015

2.62 As the table shows, the identified prime vacant retail floorspace provides a total floor area of 4,270m^2 gross or 2,989m^2 net sales (assuming 70%) of gross).

2.63 Units along Wesley Walk in particular are adjoined by major high street retailers. Therefore, there is greater potential to market these units for reoccupation.

2.64 Larger units including at Chiswick House and Chelsea House are located within prominent pitches in the shopping centre and should have the potential to attract a major retailer.

2.65 Cluster units identified on Queen Anne's Walk vary in terms of their attractiveness to potential high street retailers. However, the potential to reconfigure the units to form a larger floorplate may assist in meeting retailer requirements. Similarly, vacant units clustered around Kensington House also have the potential for reconfiguration to form larger units.

3.0 CREATE MODEL: RETAIL CAPACITY FORECASTS

3.1 Drawing on the key evidence, assumptions and forecasts described in Section 2, this section set out the key outputs and findings of the retail capacity '*refresh*'. The detailed capacity tabulations for convenience and comparison goods are provided in Appendix 2 and 3 respectively.

'EQUILBRIUM' APPROACH & 'PRODUCTIVITY' GROWTH

3.2 As explained in Section 2, it has necessarily been assumed for the purpose of this capacity *'refresh'* that the Borough's convenience and comparison goods retail market is in '*equilibrium*' at the base year. In other words we assume that the existing centres and stores are broadly trading in line with their baseline 'benchmark' turnover levels. This judgement is generally supported by the evidence which does not demonstrate, categorically, that any of the Borough's existing centres and stores are '*overtrading*' to any significant degree[8]. The '*equilibrium*' approach is also preferred as it allows for existing centres and stores to recover trading levels and maintain their viability in the immediate post recessionary period.

3.3 On this basis any residual expenditure available to support new retail floorspace within the Study Area over the development plan period will be a function of the difference between the forecast growth in '**potential'** turnover levels derived from the survey-derived market share analysis and '*inflow*' assumptions; and the growth in **'benchmark'** turnovers based on applying robust year-on-year 'productivity' growth rates to all existing and new retail floorspace.

3.4 In simple terms, floorspace '***productivity***' (or turnover '*efficiency*') growth represents the ability of retailers to absorb higher than inflation increases in their costs year-on-year (such as rents, rates and service charges) to help maintain their profitability and viability. In this case the turnover '*productivity*' growth rates have been informed by the latest forecasts in Experian's latest *Retail Planner Briefing Note 12* (October 2014) as summarised in the table below. These growth rates are based on predicted changes in retail floorspace over time and make an allowance for non-store retailing.

Table 3.1 Forecast 'productivity' growth rates

	2013	2014	2015	2016	2017-2020	2021	2022-2031
Convenience Goods:	-1.8	-1.4	-0.3	-0.4	-0.2	-0.2	0.1
Comparison Goods:	4.3	5.3	3.8	2.3	2.0	2.0	2.2

Source: Experian Retail Planner Briefing Note 12 Addendum (October 2014), Figures 4a and 4b.

8 Overtrading normally manifests itself at the local level in terms of pedestrian and car park congestion, long queues at checkouts, congestion in aisles, etc.

3.5 The forecasts show that the scope for sales density growth is very limited for convenience goods retailing, and this is mainly explained by the slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, Experian state that the trends towards more modern, higher density stores and the demolition of older inefficient space will help to sustain average growth rates of over +2.0% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century. It should also be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

3.6 As stated above, the application of a turnover 'efficiency' growth rate is a standard approach used for retail planning capacity and impact assessments, and has been used to inform our 2015 retail capacity '*refresh*'.

CONVENIENCE GOODS CAPACITY

3.7 Table 13 (**Appendix 2**) sets out and explains the key steps underpinning the 'global' convenience goods capacity assessment for Basingstoke and Deane Borough. The residual expenditure and floorspace capacity forecasts are summarised below:

Table 3.2 Basingstoke and Deane Borough – Convenience Goods Capacity

	2017	2022	2027	2029	2031
Residual Expenditure (£m):	-£33.2	-£15.9	£23.0	£33.9	£44.1
FLOORSPACE CAPACITY (m^2 net):					
Superstore Format:	**-2,675**	**-1,290**	**1,855**	**2,727**	**3,539**
Supermarket/ Deep Discount Format:	-4,776	-2,303	3,312	4,870	6,320

Source: Table 13, Appendix 2

3.8 In order to convert the residual expenditure into a net sales figure we have assumed that new '*superstore format'* floorspace will be occupied by a '*top 6*' grocer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) and will achieve an average sales density of circa £12,500 per m^2 in 2015 (2013 prices).

3.9 After taking into account the commitments for new foodstores at Basing View (Waitrose), other planned convenience floorspace, and new store openings since 2012 (including Lidl at Gastons Wood), the forecasts show that there is no forecast capacity in Borough in the short to medium term (i.e. up 2022). However, forecast capacity emerges for 1,855m^2 net in 2027; increasing to 2,727m^2 net by 2029. This could support a new major foodstore in the town centre in the medium term to long term.

3.10 Alternatively, assuming the residual expenditure capacity is taken up by a supermarket (e.g. Co-Op, Budgens, etc.) and/or 'deep discount' retailer (e.g. Aldi, Lidl, Netto, etc.) trading at lower average sales levels of approximately £7,000 per m^2 in 2015, then forecast capacity increases to 3,312m^2 net of new convenience floorspace in 2027, and 4,870m^2 net by 2029.

3.11 A new anchor foodstore in the town centre would not only help to claw back leaked expenditure from the CCA to competing foodstores within and outside the Borough, but it would also boost footfall in the town centre. This would help to support linked trips with other retailer and services; in turn strengthening town centre vitality and viability. Alternatively, deep discount foodstores (e.g. Aldi, Lidl, Netto) can also help to improve expenditure retention for town centres; particularly where there is no other deep discounter trading in the town centre. Whilst deep discounter do not match the level of convenience offer provided by key anchor foodstores; they becoming a more popular destination for main food shopping. However, any provision for new deep discount

COMPARISON GOODS CAPACITY

3.12 Table 13 (**Appendix 3**) sets out the detailed steps in the comparison goods capacity assessment. The results are summarised below.

Table 3.3 Basingstoke and Deane Borough – Comparison Goods Capacity

	2017	2022	2027	2029	2031
Residual Expenditure (£m):	-£18.4	£33.6	£114.5	£163.7	£208.5
FLOORSPACE CAPACITY (m^2 net):	**-3,602**	**5,944**	**18,179**	**24,354**	**29,702**

Source: Table 13, Appendix 3 (Steps 5 & 6)

3.13 As the table shows, there is no Borough-wide capacity for new retail floorspace in 2020 after taking into account all new commitments. There is capacity for 5,944m^2 net of new comparison goods floorspace in 2022, increasing substantially to 18,179m^2 net in 2027 and 24,354m^2 net in 2029. By the end of the forecast period (2031) capacity increases to 29,702m^2 net.

3.14 As part of this 'refresh' we have also considered the potential for some of the identified forecast capacity to be addressed by existing prime vacant retail floorspace (2,989m^2 net sales) in Basingstoke Town Centre, as highlighted in Table 2.1 (Section 2). On this basis, forecast capacity for comparison goods floorspace reduces to **2,955m^2 net sales in 2022, 15,190m^2 in 2027** and **21,365m^2 net sales by 2029**. However, this assumes that identified prime vacant floorspace remains vacant in the long term. Therefore, forecast capacity based on the potential to reoccupy prime vacant floorspace will be subject to change. In any case, there remains a considerable quantum of comparison floorspace capacity for the Borough.

3.15 The forecast residual expenditure capacity has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £5,000 per m^2 at 2015. This is broadly equivalent to an average sales density for retail units in prime shopping locations. However, average sales levels will inevitably vary between different locations, different formats, and different operators[9]. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when assessing and determining applications for different operators and different types of retail floorspace in different locations (such as, for example, 'bulky goods' retail warehousing).

3.16 As for convenience goods retailing, this capacity should be directed to town centres first, in accordance with national and local plan policy. This will be subject to the identification and allocation of suitable and commercially viable sites either in or on the edge of town centres (principally Basingstoke Town Centre in this case) that are capable of accommodating the identified need in full over the lifetime of the development plan.

SUMMARY

3.17 In summary the retail capacity refresh shows the following 'global' capacity for new comparison and convenience goods retail in Basingstoke and Deane Borough over the forecast period.

Table 3.4 Basingstoke and Deane Borough –Capacity Forecasts (m^2 net)

	2017	2022	2027	2029	2031
Convenience Capacity					
Foodstore format	-2,675	-1,290	1,855	2,727	3,539
(Supermarket/ Deep Discount format)	(-4,776)	(-2,303)	(3,312)	(4,870)	(6,320)
Comparison Capacity:	-3,602	5,944	18,179	24,354	29,702

Source: Table 13, Appendices 2 & 3 (Step 6)
Notes: Alternative forecast capacity for new convenience capacity is provided based on supermarket/ deep discount format floorspace.

3.18 As the table shows, there is no forecast capacity for new retail floorspace at 2022 due to the impact of new development and commitments in the Borough. This includes the Waitrose store and John Lewis at Home at Basing View as well as the accumulation of floorspace associated with stores openings since 2012 (e.g. Lidl and B&M Homestore at Gastons Wood and other smaller schemes).

3.19 These revised forecasts are significantly lower than identified by the *2012 Retail Study Update*, which identified capacity for 1,607m^2 net of new convenience goods floorspace and 16,610m^2 net of comparison goods sales in 2031. The compares with our revised forecasts of no capacity for convenience goods floorspace and 5,944m^2 net for

[9] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m^2, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m^2 and above.

comparison goods floorspace in 2022. By 2031, the difference in forecast capacity for convenience and comparison goods capacity between the *2012 Retail Study Update* and the *2015 'refresh'* increases further.

3.20 The explanation for these significant changes in floorspace capacity since the 2012 Retail Study Update was prepared are many and varied, and include:

- the impact of the economic recession, which has significantly reduced retail expenditure per capita levels and year-on-year growth in retail (convenience and comparison goods) expenditure;
- the impact of new development and planned commitments on forecast capacity, principally at Basing View;
- the significant forecast increase in the market share of Special Forms of Trading due to the growth in internet shopping; and
- a lower floorspace 'productivity' growth rate for existing and new comparison goods floorspace;

3.21 When considering where forecast retail floorspace should be directed within the Borough this will be dependent on the availability of suitable and viable sites available in centres or there may be policy, heritage, transport and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives.

3.22 If sufficient town centre and/or edge of centre sites are not available to meet the forecast capacity over the development plan period, then local planning authorities are required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible and sustainable (out of centre) locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, such as through linked pedestrian trips and increased footfall.

3.23 Of particular note, the Council should be aware that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term. The Council should take into account these margins for error when assessing the need for new retail floorspace, particularly post 2025.

4.0 SUMMARY AND CONCLUSIONS

4.1 Carter Jonas was instructed by Basingstoke and Deane Borough Council in July 2015 to carry out a *'refresh'* of the Council's previous evidence-based retail capacity studies published in 2008, 2009, and 2012[10].

4.2 This '*refresh*' takes into account the changes in the base year assumptions and growth forecasts post-recession, and has been prepared in accordance with national planning policy and guidance. This includes the *National Planning Policy Framework* (NPPF, March 2012) and *National Planning Practice Guidance* (NPPG, March 2014); both of which set out the Government's key objective of sustainable economic development and, as an important part of this, ensuring the vitality and viability of town centres.

4.3 We understand that this initial '*refresh*' work is required by the Council to provide further evidence in the preparation of the Basingstoke and Deane Borough Local Plan Public Examination in October 2015.

4.4 However, it should be noted that Carter Jonas was not instructed by the Council as part of this work to:

- update the town centre health checks which formed part of the *2008 Retail Study*;
- update the household telephone interview survey conducted for the *2012 Retail Study Update*;
- carry out a detailed sequential assessment of potential opportunity sites to accommodate any identified need for new retail floorspace.

4.5 Given that a number of major retail schemes have opened or are due to open since the last household telephone survey was completed, we strongly advise the Council that they should commission a new survey as part of any future retail capacity update. This will provide a more robust assessment of retail market shares for the Borough and it's centres.

RETAIL CAPACITY '*REFRESH*'

4.6 The retail capacity '*refresh*' has identified no Borough-wide capacity for new retail convenience goods floorspace in the short term (up to 2022). However, forecast capacity emerges in 2027 for 1,855m^2 net of new convenience retail floorspace; increasing to 2,727m^2 net in 2029. Forecast capacity increases when considering the potential deep discount (e.g. Aldi, Lidl, Netto, etc.) or local convenience (e.g. Budgens, Co-op, etc.) format floorspace.

[10] The *2008 Retail Study and 2009 and 2012 Updates were* originally prepared by Strategic Perspectives LLP – now part of Carter Jonas LLP

4.7 For comparison goods floorspace, there no capacity for new floorspace in 2017. However, by 2022 there is capacity for 5,944m^2; increasing to 18,179m^2 in 2027 and 24,354m^2 net in 2029.

4.8 Forecast capacity for comparison goods reduces to **2,955m^2 net sales in 2022, 15,190m^2 in 2027** and **21,365m^2 net sales by 2029** when taking account of the potential to reoccupy current prime vacant retail floorspace (2,989m^2 net sales) in Basingstoke Town Centre. However, this assumes that identified prime vacant floorspace remains vacant in the long term. Therefore, forecast capacity based on the potential to reoccupy prime vacant floorspace will be subject to change.

4.9 Finally, it should be noted that the capacity forecasts in the 'refresh' are likely to be an over-estimate due to the absence of up to date survey data on shopping patterns and the growth of online shopping, as well as the impact of using higher population projections (ONS 2012-based SNPP). Furthermore, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. The Council should take into account these margins for error when assessing the need for new retail floorspace, particularly post 2025.

5.0 GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These

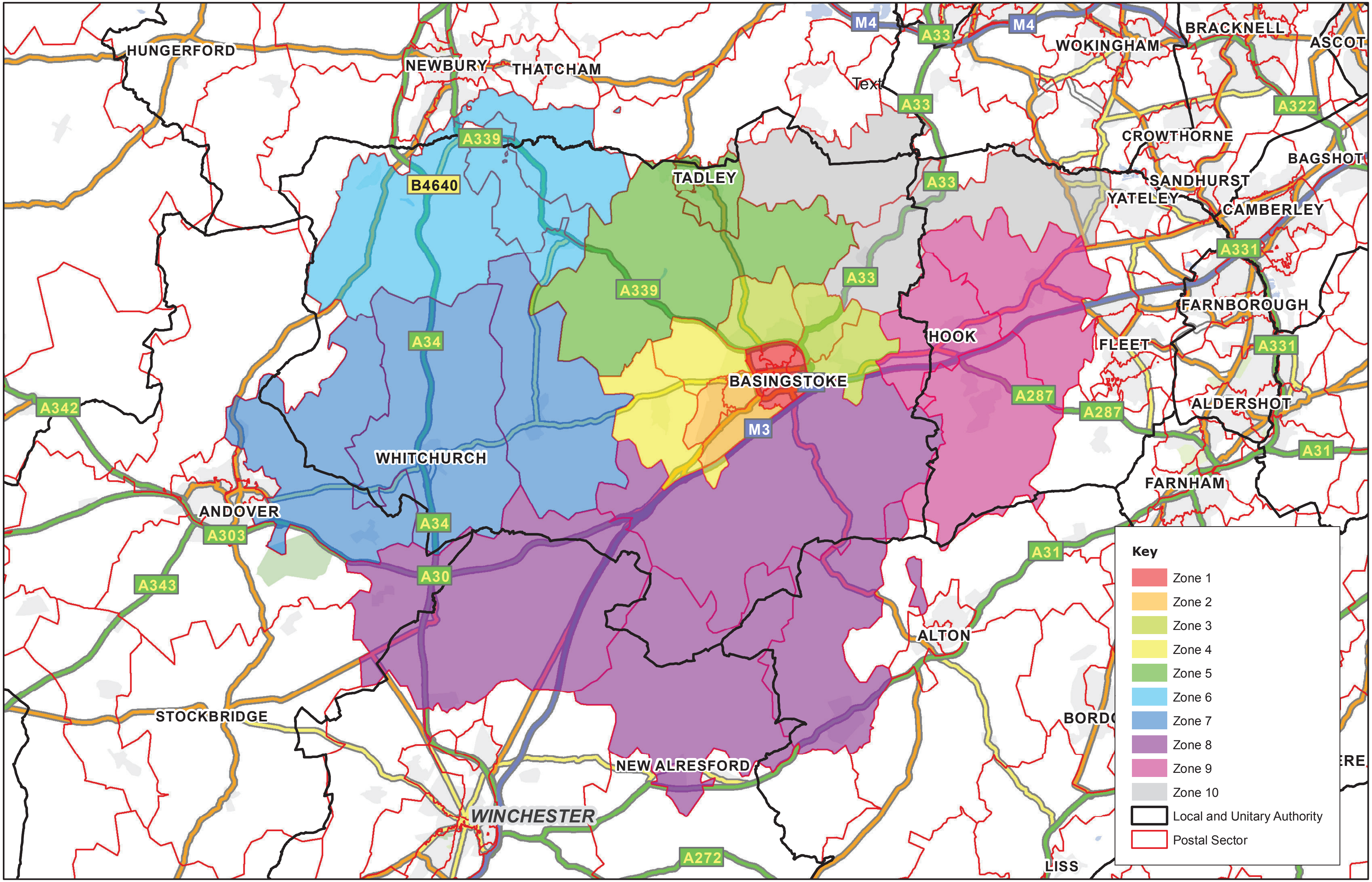
	include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE ‘PRODUCTIVITY’ (‘EFFICIENCY’) GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or ‘quantitative need’ can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the

	appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

– END –

APPENDIX 1: STUDY AREA

Catchment Area - Basingstoke and Deane Retail Study 'Refresh' 2015



APPENDIX 2: CONVENIENCE GOODS CAPACITY ASSESSMENT

Convenience Goods Capacity Assessment

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2031)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031	GROWTH (%) 2015 - 31
Zone 1:	Central Basingstoke	27,833	28,479	30,011	31,304	31,761	32,191	15.7%
Zone 2:	Basingstoke West	42,927	43,913	46,191	48,131	48,820	49,430	15.1%
Zone 3:	Basingstoke East	34,103	34,898	36,739	38,291	38,825	39,320	15.3%
Zone 4:	Basingstoke North West	12,383	12,669	13,358	13,928	14,130	14,325	15.7%
Zone 5:	Tadley	23,234	23,767	24,998	26,041	26,410	26,743	15.1%
Zone 6:	Newbury South	13,695	13,982	14,658	15,217	15,418	15,609	14.0%
Zone 7:	Whitchurch	17,013	17,318	18,059	18,687	18,911	19,115	12.4%
Zone 8:	Basingstoke South	24,687	25,053	25,956	26,819	27,129	27,416	11.1%
Zone 9:	Hook	23,519	23,761	24,367	24,839	25,003	25,156	7.0%
Zone 10:	Basingstoke North East	8,300	8,457	8,834	9,153	9,265	9,370	12.9%
TOTAL:		**227,694**	**232,297**	**243,171**	**252,410**	**255,672**	**258,675**	**13.6%**
Zones 1-4	**CORE' CATCHMENT AREA (CCA):**	117,246	119,959	126,299	131,654	133,536	135,266	15.4%

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Notes: Base year population derived from ONS 2012-based Sub National Population Projections released in May 2014.

Projections are based on Experian's revised *'demographic component model'*. This takes into account 2012 ONS Sub National Population Projections. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate. Basingstoke & Deane Council has confirmed that the most recent annual dwelling allocations for the District are broadly based on the projected increase in population identified by Experian and that there will be no population growth arising from new residential development over and above the Experian projections.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2013 prices)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031
Zone 1:	Central Basingstoke	£1,992	£2,002	£2,039	£2,111	£2,140	£2,168
Zone 2:	Basingstoke West	£1,953	£1,962	£1,999	£2,069	£2,098	£2,125
Zone 3:	Basingstoke East	£1,992	£2,001	£2,038	£2,110	£2,140	£2,167
Zone 4:	Basingstoke North West	£2,282	£2,293	£2,336	£2,418	£2,452	£2,483
Zone 5:	Tadley	£2,301	£2,312	£2,355	£2,438	£2,472	£2,504
Zone 6:	Newbury South	£2,385	£2,397	£2,441	£2,527	£2,562	£2,595
Zone 7:	Whitchurch	£2,243	£2,254	£2,296	£2,377	£2,410	£2,441
Zone 8:	Basingstoke South	£2,414	£2,426	£2,471	£2,557	£2,593	£2,626
Zone 9:	Hook	£2,242	£2,253	£2,295	£2,375	£2,408	£2,439
Zone 10:	Basingstoke North East	£2,429	£2,441	£2,486	£2,574	£2,609	£2,643

Source: Average spend per capita estimates are in 2013 prices and derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 10.1* (September 2012). Please note that an allowance has been made at the base year and over the forecast period for expenditure on Special Forms of Trading (SFT), including Internet Shopping, based on the research and forecasts by Experian Business Strategies (Briefing Note 10.1) and by reference to the HTIS. Refer to report for more detailed

TABLE 3: TOTAL FORECAST GROWTH IN CONVENIENCE GOODS EXPENDITURE, 2015 - 2031 (£ million)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031	GROWTH (%) 2015 - 31
Zone 1:	Central Basingstoke	£55.4	£57.0	£61.2	£66.1	£68.0	£69.8	25.8%
Zone 2:	Basingstoke West	£83.8	£86.2	£92.3	£99.6	£102.4	£105.0	25.3%
Zone 3:	Basingstoke East	£67.9	£69.8	£74.9	£80.8	£83.1	£85.2	25.4%
Zone 4:	Basingstoke North West	£28.3	£29.1	£31.2	£33.7	£34.6	£35.6	25.9%
Zone 5:	Tadley	£53.5	£55.0	£58.9	£63.5	£65.3	£67.0	25.2%
Zone 6:	Newbury South	£32.7	£33.5	£35.8	£38.5	£39.5	£40.5	24.0%
Zone 7:	Whitchurch	£38.2	£39.0	£41.5	£44.4	£45.6	£46.7	22.2%
Zone 8:	Basingstoke South	£59.6	£60.8	£64.1	£68.6	£70.3	£72.0	20.8%
Zone 9:	Hook	£52.7	£53.5	£55.9	£59.0	£60.2	£61.4	16.4%
Zone 10:	Basingstoke North East	£20.2	£20.6	£22.0	£23.6	£24.2	£24.8	22.8%
TOTAL:		**£492.2**	**£504.5**	**£537.7**	**£577.6**	**£593.2**	**£607.8**	**23.5%**
Zones 1-4	**'CENTRAL' CATCHMENT AREA (CCA):**	£235.5	£242.1	£259.6	£280.1	£288.1	£295.6	25.5%

Source: Expenditure calculated from Tables 1 & 2.

Convenience Goods Capacity Assessment

TABLE 4: MARKET SHARE ANALYSIS

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
BASINGSTOKE TOWN CENTRE							
Sainsbury's	5.1%	0.2%	1.0%	0.7%	0.0%	0.0%	1.0%
Tesco Metro	0.5%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%
Iceland	1.4%	2.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Marks & Spencers	1.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.2%
Other Convenience Stores	1.1%	0.2%	0.0%	0.0%	0.5%	0.9%	1.0%
	9.9%	**3.3%**	**1.3%**	**0.7%**	**0.5%**	**0.9%**	**2.5%**
CHINEHAM DISTRICT CENTRE							
Tesco	17.3%	14.3%	0.3%	2.0%	1.8%	2.7%	20.0%
Marks & Spencer	1.7%	1.7%	0.0%	0.3%	0.0%	0.2%	1.2%
Other Convenience Stores	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	19.6%	**15.9%**	**0.3%**	**2.3%**	**1.8%**	**3.0%**	**21.2%**
BRIGHTON HILL DISTRICT CENTRE							
Asda	15.6%	4.2%	0.6%	3.8%	2.2%	2.5%	1.2%
Other Convenience Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	15.6%	**4.2%**	**0.6%**	**3.8%**	**2.2%**	**2.5%**	**1.2%**
WHITCHURCH DISTRICT CENTRE							
Co-Op, Bell Street	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%
Other Convenience Stores	0.0%	0.0%	0.0%	4.0%	0.3%	0.0%	0.0%
	0.0%	**0.0%**	**0.0%**	**7.8%**	**0.3%**	**0.0%**	**0.0%**
TADLEY DISTRICT CENTRE							
Sainsbury's, Mulfords Hill	0.6%	48.8%	3.6%	0.0%	0.0%	0.0%	25.9%
Other Convenience Stores	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.2%
	0.6%	**52.8%**	**3.6%**	**0.0%**	**0.0%**	**0.0%**	**26.1%**
OVERTON DISTRICT CENTRE							
Co-Op, Winchester Street	0.1%	0.2%	0.7%	12.7%	0.0%	0.0%	0.0%
Other Convenience Stores	0.0%	0.0%	0.0%	1.6%	0.2%	0.0%	0.0%
	0.2%	**0.2%**	**0.7%**	**14.3%**	**0.2%**	**0.0%**	**0.0%**
KINGSCLERE LOCAL CENTRE							
Other Convenience Stores	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%
	0.0%	**0.0%**	**6.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
OTHER LOCAL SHOPS/PARADES	**5.2%**	**2.8%**	**0.5%**	**0.8%**	**2.8%**	**0.0%**	**6.0%**
OUT OF CENTRE							
Co-op, Giles Walk, Tadley	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Winklebury Way	0.9%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Churchill Way West	0.9%	1.0%	1.0%	0.5%	0.3%	0.0%	0.3%
Morrisons, Worting Road	19.4%	6.8%	2.0%	15.4%	4.1%	4.8%	6.5%
Sainsbury's, Wallop Drive	24.7%	1.9%	0.3%	13.4%	12.8%	4.1%	0.5%
Tesco, Baughurst	0.0%	3.3%	0.3%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Oakridge Road	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	46.6%	**13.7%**	**3.5%**	**29.3%**	**17.1%**	**8.9%**	**7.3%**
BOROUGH AREA SUBTOTAL:	**97.8%**	**93.2%**	**16.8%**	**58.9%**	**24.9%**	**15.4%**	**64.4%**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH							
Aldershot	0.0%	0.0%	0.3%	0.0%	0.7%	0.0%	0.0%
Alresford	0.0%	0.0%	0.0%	0.0%	8.6%	0.0%	0.0%
Alton	0.0%	0.0%	0.0%	0.0%	23.1%	1.6%	0.0%
Andover	0.0%	0.0%	1.3%	28.6%	2.6%	0.0%	0.0%
Bordon	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Camberley	0.2%	0.0%	1.0%	0.0%	0.0%	8.3%	2.6%
Elvetham Heath, Fleet	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	0.5%
Farnborough	0.0%	0.2%	0.0%	0.0%	0.6%	0.9%	0.0%
Farnham	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Fleet	0.2%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%
Hook	0.2%	0.0%	0.0%	0.3%	1.0%	49.1%	2.3%
Mortimer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
Newbury	0.3%	4.2%	76.6%	8.7%	0.0%	0.0%	0.8%
Reading	0.6%	0.9%	1.0%	0.0%	0.0%	0.0%	7.6%
Southampton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thatcham	0.0%	0.7%	1.3%	0.0%	0.0%	0.0%	0.3%
Winchester	0.1%	0.0%	0.3%	3.3%	32.5%	0.0%	0.3%
Wokingham	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	3.2%
All other shops and stores	0.7%	0.7%	1.1%	0.0%	5.6%	11.1%	14.4%
OUTSIDE BOROUGH SUBTOTAL:	**2.2%**	**6.8%**	**83.2%**	**41.1%**	**75.1%**	**84.6%**	**35.6%**
TOTAL:	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Results of NEMS Household Telephone Interview Survey (April 2012) commissioned by Strategic Perspectives.
Notes: Assumes that main food shopping constitutes 65% of total convenience expenditure, secondary shopping 15% and top-up shopping 20%.

TABLE 5: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2015

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£12.1	£0.1	£0.3	£0.3	£0.0	£0.0	£0.2	£13.0
Tesco Metro	£1.3	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Iceland	£3.3	£1.1	£0.0	£0.0	£0.0	£0.0	£0.1	£4.5
Marks & Spencers	£4.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3
Other Convenience Stores	£2.6	£0.1	£0.0	£0.0	£0.3	£0.5	£0.2	£3.7
	£23.3	**£1.8**	**£0.4**	**£0.3**	**£0.3**	**£0.5**	**£0.5**	**£27.1**
CHINEHAM DISTRICT CENTRE								
Tesco	£40.9	£7.6	£0.1	£0.8	£1.0	£1.4	£4.0	£55.9
Marks & Spencer	£4.0	£0.9	£0.0	£0.1	£0.0	£0.1	£0.2	£5.3
Other Convenience Stores	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2
	£46.1	**£8.5**	**£0.1**	**£0.9**	**£1.0**	**£1.6**	**£4.3**	**£62.4**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£36.8	£2.3	£0.2	£1.5	£1.3	£1.3	£0.2	£43.6
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£36.8	**£2.3**	**£0.2**	**£1.5**	**£1.3**	**£1.3**	**£0.2**	**£43.6**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£1.5
Other Convenience Stores	£0.0	£0.0	£0.0	£1.5	£0.2	£0.0	£0.0	£1.7
	£0.0	**£0.0**	**£0.0**	**£3.0**	**£0.2**	**£0.0**	**£0.0**	**£3.2**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.5	£26.1	£1.2	£0.0	£0.0	£0.0	£5.2	£34.0
Other Convenience Stores	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
	£1.5	**£28.2**	**£1.2**	**£0.0**	**£0.0**	**£0.0**	**£5.3**	**£36.2**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.3	£0.1	£0.2	£4.8	£0.0	£0.0	£0.0	£5.5
Other Convenience Stores	£0.1	£0.0	£0.0	£0.6	£0.1	£0.0	£0.0	£0.8
	£0.4	**£0.1**	**£0.2**	**£5.4**	**£0.1**	**£0.0**	**£0.0**	**£6.3**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£2.1
	£0.0	**£0.0**	**£2.1**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.1**
OTHER LOCAL SHOPS/PARADES	**£12.4**	**£1.5**	**£0.2**	**£0.3**	**£1.7**	**£0.0**	**£1.2**	**£17.2**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Lidl, Churchill Way West	£2.2	£0.5	£0.3	£0.2	£0.2	£0.0	£0.1	£3.4
Morrisons, Worting Road	£45.6	£3.7	£0.7	£5.9	£2.4	£2.5	£1.3	£62.0
Sainsbury's, Wallop Drive	£58.2	£1.0	£0.1	£5.1	£7.6	£2.2	£0.1	£74.2
Tesco, Baughurst	£0.0	£1.8	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Tesco Express, Oakridge Road	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
	£109.8	**£7.3**	**£1.2**	**£11.2**	**£10.2**	**£4.7**	**£1.5**	**£145.9**
BOROUGH AREA SUBTOTAL:	**£230.2**	**£49.8**	**£5.5**	**£22.5**	**£14.9**	**£8.1**	**£13.0**	**£344.0**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£0.5
Alresford	£0.0	£0.0	£0.0	£0.0	£5.2	£0.0	£0.0	£5.2
Alton	£0.0	£0.0	£0.0	£0.0	£13.8	£0.8	£0.0	£14.6
Andover	£0.0	£0.0	£0.4	£10.9	£1.6	£0.0	£0.0	£12.9
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.4	£0.0	£0.3	£0.0	£0.0	£4.4	£0.5	£5.6
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£0.1	£3.3
Farnborough	£0.0	£0.1	£0.0	£0.0	£0.4	£0.5	£0.0	£1.0
Farnham	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.4
Fleet	£0.4	£0.0	£0.0	£0.0	£0.0	£4.0	£0.0	£4.4
Hook	£0.4	£0.0	£0.0	£0.1	£0.6	£25.9	£0.5	£27.4
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7
Newbury	£0.6	£2.3	£25.0	£3.3	£0.0	£0.0	£0.2	£31.4
Reading	£1.4	£0.5	£0.3	£0.0	£0.0	£0.0	£1.5	£3.7
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.4	£0.4	£0.0	£0.0	£0.0	£0.1	£0.9
Winchester	£0.2	£0.0	£0.1	£1.2	£19.4	£0.0	£0.1	£21.0
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.7	£0.8
All other shops and stores	£1.6	£0.4	£0.4	£0.0	£3.3	£5.8	£2.9	£14.4
OUTSIDE BOROUGH SUBTOTAL:	**£5.2**	**£3.7**	**£27.2**	**£15.7**	**£44.7**	**£44.6**	**£7.2**	**£148.3**
TOTAL:	**£235.5**	**£53.5**	**£32.7**	**£38.2**	**£59.6**	**£52.7**	**£20.2**	**£492.3**

Source: Derived by applying the market share analysis (Table 4) to the available expenditure at the base year (Table 3)

Convenience Goods Capacity Assessment

TABLE 6: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2017

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£12.4	£0.1	£0.3	£0.3	£0.0	£0.0	£0.2	£13.3
Tesco Metro	£1.3	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£1.7
Iceland	£3.4	£1.2	£0.0	£0.0	£0.0	£0.0	£0.1	£4.6
Marks & Spencers	£4.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4
Other Convenience Stores	£2.7	£0.1	£0.0	£0.0	£0.3	£0.5	£0.2	£3.8
	£24.0	**£1.8**	**£0.4**	**£0.3**	**£0.3**	**£0.5**	**£0.5**	**£27.8**
CHINEHAM DISTRICT CENTRE								
Tesco	£42.0	£7.8	£0.1	£0.8	£1.1	£1.5	£4.1	£57.4
Marks & Spencer	£4.1	£0.9	£0.0	£0.1	£0.0	£0.1	£0.2	£5.5
Other Convenience Stores	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3
	£47.3	**£8.8**	**£0.1**	**£0.9**	**£1.1**	**£1.6**	**£4.4**	**£64.1**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£37.8	£2.3	£0.2	£1.5	£1.4	£1.4	£0.3	£44.8
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£37.8	**£2.3**	**£0.2**	**£1.5**	**£1.4**	**£1.4**	**£0.3**	**£44.8**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£1.5
Other Convenience Stores	£0.0	£0.0	£0.0	£1.5	£0.2	£0.0	£0.0	£1.7
	£0.0	**£0.0**	**£0.0**	**£3.0**	**£0.2**	**£0.0**	**£0.0**	**£3.2**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.6	£26.8	£1.2	£0.0	£0.0	£0.0	£5.3	£34.9
Other Convenience Stores	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
	£1.6	**£29.0**	**£1.2**	**£0.0**	**£0.0**	**£0.0**	**£5.4**	**£37.2**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.3	£0.1	£0.2	£4.9	£0.0	£0.0	£0.0	£5.6
Other Convenience Stores	£0.1	£0.0	£0.0	£0.6	£0.1	£0.0	£0.0	£0.8
	£0.4	**£0.1**	**£0.2**	**£5.6**	**£0.1**	**£0.0**	**£0.0**	**£6.5**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£2.1
	£0.0	**£0.0**	**£2.1**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.1**
OTHER LOCAL SHOPS/PARADES	**£12.7**	**£1.6**	**£0.2**	**£0.3**	**£1.7**	**£0.0**	**£1.2**	**£17.7**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Lidl, Churchill Way West	£2.2	£0.5	£0.3	£0.2	£0.2	£0.0	£0.1	£3.5
Morrisons, Worting Road	£46.8	£3.8	£0.7	£6.0	£2.5	£2.6	£1.3	£63.7
Sainsbury's, Wallop Drive	£59.8	£1.0	£0.1	£5.2	£7.8	£2.2	£0.1	£76.2
Tesco, Baughurst	£0.0	£1.8	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Tesco Express, Oakridge Road	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
	£112.9	**£7.6**	**£1.2**	**£11.5**	**£10.4**	**£4.8**	**£1.5**	**£149.8**
BOROUGH AREA SUBTOTAL:	**£236.7**	**£51.2**	**£5.6**	**£23.0**	**£15.2**	**£8.2**	**£13.3**	**£353.2**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£0.5
Alresford	£0.0	£0.0	£0.0	£0.0	£5.3	£0.0	£0.0	£5.3
Alton	£0.0	£0.0	£0.0	£0.0	£14.0	£0.9	£0.0	£14.9
Andover	£0.0	£0.0	£0.4	£11.2	£1.6	£0.0	£0.0	£13.2
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.4	£0.0	£0.3	£0.0	£0.0	£4.4	£0.5	£5.7
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£0.1	£3.3
Farnborough	£0.0	£0.1	£0.0	£0.0	£0.4	£0.5	£0.0	£1.0
Farnham	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.4
Fleet	£0.4	£0.0	£0.0	£0.0	£0.0	£4.1	£0.0	£4.5
Hook	£0.4	£0.0	£0.0	£0.1	£0.6	£26.3	£0.5	£27.8
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7
Newbury	£0.6	£2.3	£25.7	£3.4	£0.0	£0.0	£0.2	£32.2
Reading	£1.4	£0.5	£0.3	£0.0	£0.0	£0.0	£1.6	£3.8
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.4	£0.4	£0.0	£0.0	£0.0	£0.1	£0.9
Winchester	£0.2	£0.0	£0.1	£1.3	£19.8	£0.0	£0.1	£21.4
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.7	£0.9
All other shops and stores	£1.6	£0.4	£0.4	£0.0	£3.4	£5.9	£3.0	£14.7
OUTSIDE BOROUGH SUBTOTAL:	**£5.4**	**£3.8**	**£27.9**	**£16.0**	**£45.6**	**£45.3**	**£7.4**	**£151.3**
TOTAL MARKET SHARE:	**£242.1**	**£55.0**	**£33.5**	**£39.0**	**£60.8**	**£53.5**	**£20.6**	**£504.5**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 7: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2022

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£13.3	£0.1	£0.3	£0.3	£0.0	£0.0	£0.2	£14.3
Tesco Metro	£1.4	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£1.8
Iceland	£3.6	£1.2	£0.0	£0.0	£0.0	£0.0	£0.1	£5.0
Marks & Spencers	£4.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£4.7
Other Convenience Stores	£2.9	£0.1	£0.0	£0.0	£0.3	£0.5	£0.2	£4.1
	£25.7	**£2.0**	**£0.5**	**£0.3**	**£0.3**	**£0.5**	**£0.5**	**£29.8**
CHINEHAM DISTRICT CENTRE								
Tesco	£45.0	£8.4	£0.1	£0.8	£1.1	£1.5	£4.4	£61.4
Marks & Spencer	£4.4	£1.0	£0.0	£0.1	£0.0	£0.1	£0.3	£5.8
Other Convenience Stores	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4
	£50.8	**£9.4**	**£0.1**	**£0.9**	**£1.1**	**£1.7**	**£4.7**	**£68.6**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£40.5	£2.5	£0.2	£1.6	£1.4	£1.4	£0.3	£47.9
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£40.5	**£2.5**	**£0.2**	**£1.6**	**£1.4**	**£1.4**	**£0.3**	**£47.9**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£1.6
Other Convenience Stores	£0.0	£0.0	£0.0	£1.6	£0.2	£0.0	£0.0	£1.8
	£0.0	**£0.0**	**£0.0**	**£3.2**	**£0.2**	**£0.0**	**£0.0**	**£3.4**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.7	£28.7	£1.3	£0.0	£0.0	£0.0	£5.7	£37.4
Other Convenience Stores	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.1	£2.4
	£1.7	**£31.1**	**£1.3**	**£0.0**	**£0.0**	**£0.0**	**£5.7**	**£39.8**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.3	£0.1	£0.3	£5.3	£0.0	£0.0	£0.0	£6.0
Other Convenience Stores	£0.1	£0.0	£0.0	£0.7	£0.1	£0.0	£0.0	£0.9
	£0.4	**£0.1**	**£0.3**	**£5.9**	**£0.1**	**£0.0**	**£0.0**	**£6.9**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£2.3
	£0.0	**£0.0**	**£2.3**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.3**
OTHER LOCAL SHOPS/PARADES	**£13.6**	**£1.7**	**£0.2**	**£0.3**	**£1.8**	**£0.0**	**£1.3**	**£18.9**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4
Lidl, Churchill Way West	£2.4	£0.6	£0.3	£0.2	£0.2	£0.0	£0.1	£3.8
Morrisons, Worting Road	£50.2	£4.0	£0.7	£6.4	£2.6	£2.7	£1.4	£68.1
Sainsbury's, Wallop Drive	£64.1	£1.1	£0.1	£5.5	£8.2	£2.3	£0.1	£81.5
Tesco, Baughurst	£0.0	£2.0	£0.1	£0.0	£0.0	£0.0	£0.0	£2.0
Tesco Express, Oakridge Road	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
	£121.1	**£8.1**	**£1.3**	**£12.2**	**£11.0**	**£5.0**	**£1.6**	**£160.2**
BOROUGH AREA SUBTOTAL:	**£253.8**	**£54.8**	**£6.0**	**£24.4**	**£16.0**	**£8.6**	**£14.1**	**£377.8**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£5.5	£0.0	£0.0	£5.5
Alton	£0.0	£0.0	£0.0	£0.0	£14.8	£0.9	£0.0	£15.7
Andover	£0.0	£0.0	£0.5	£11.9	£1.7	£0.0	£0.0	£14.0
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.5	£0.0	£0.4	£0.0	£0.0	£4.6	£0.6	£6.0
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	£0.1	£3.5
Farnborough	£0.0	£0.1	£0.0	£0.0	£0.4	£0.5	£0.0	£1.1
Farnham	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.4
Fleet	£0.4	£0.0	£0.0	£0.0	£0.0	£4.3	£0.0	£4.7
Hook	£0.4	£0.0	£0.0	£0.1	£0.6	£27.5	£0.5	£29.1
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8
Newbury	£0.7	£2.5	£27.4	£3.6	£0.0	£0.0	£0.2	£34.4
Reading	£1.5	£0.6	£0.3	£0.0	£0.0	£0.0	£1.7	£4.1
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.4	£0.5	£0.0	£0.0	£0.0	£0.1	£0.9
Winchester	£0.2	£0.0	£0.1	£1.4	£20.8	£0.0	£0.1	£22.6
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.7	£0.9
All other shops and stores	£1.7	£0.4	£0.4	£0.0	£3.6	£6.2	£3.2	£15.5
OUTSIDE BOROUGH SUBTOTAL:	**£5.8**	**£4.0**	**£29.8**	**£17.0**	**£48.1**	**£47.3**	**£7.8**	**£159.9**
TOTAL MARKET SHARE:	**£259.6**	**£58.9**	**£35.8**	**£41.5**	**£64.1**	**£55.9**	**£22.0**	**£537.7**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 8: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2027

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£14.3	£0.2	£0.4	£0.3	£0.0	£0.0	£0.2	£15.4
Tesco Metro	£1.5	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
Iceland	£3.9	£1.3	£0.0	£0.0	£0.0	£0.0	£0.1	£5.3
Marks & Spencers	£4.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£5.1
Other Convenience Stores	£3.1	£0.2	£0.0	£0.0	£0.3	£0.5	£0.2	£4.4
	£27.8	**£2.1**	**£0.5**	**£0.3**	**£0.3**	**£0.5**	**£0.6**	**£32.1**
CHINEHAM DISTRICT CENTRE								
Tesco	£48.6	£9.1	£0.1	£0.9	£1.2	£1.6	£4.7	£66.2
Marks & Spencer	£4.7	£1.1	£0.0	£0.1	£0.0	£0.1	£0.3	£6.3
Other Convenience Stores	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5
	£54.8	**£10.1**	**£0.1**	**£1.0**	**£1.2**	**£1.8**	**£5.0**	**£74.0**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£43.8	£2.7	£0.2	£1.7	£1.5	£1.5	£0.3	£51.7
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£43.8	**£2.7**	**£0.2**	**£1.7**	**£1.5**	**£1.5**	**£0.3**	**£51.7**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£1.7
Other Convenience Stores	£0.0	£0.0	£0.0	£1.8	£0.2	£0.0	£0.0	£2.0
	£0.0	**£0.0**	**£0.0**	**£3.5**	**£0.2**	**£0.0**	**£0.0**	**£3.7**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.8	£31.0	£1.4	£0.0	£0.0	£0.0	£6.1	£40.3
Other Convenience Stores	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.1	£2.6
	£1.8	**£33.5**	**£1.4**	**£0.0**	**£0.0**	**£0.0**	**£6.2**	**£42.9**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.4	£0.2	£0.3	£5.6	£0.0	£0.0	£0.0	£6.4
Other Convenience Stores	£0.1	£0.0	£0.0	£0.7	£0.2	£0.0	£0.0	£1.0
	£0.4	**£0.2**	**£0.3**	**£6.3**	**£0.2**	**£0.0**	**£0.0**	**£7.4**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£2.4
	£0.0	**£0.0**	**£2.4**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.4**
OTHER LOCAL SHOPS/PARADES	**£14.7**	**£1.8**	**£0.2**	**£0.4**	**£1.9**	**£0.0**	**£1.4**	**£20.4**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6
Lidl, Churchill Way West	£2.6	£0.6	£0.4	£0.2	£0.2	£0.0	£0.1	£4.1
Morrisons, Worting Road	£54.2	£4.3	£0.8	£6.9	£2.8	£2.8	£1.5	£73.3
Sainsbury's, Wallop Drive	£69.2	£1.2	£0.1	£5.9	£8.7	£2.4	£0.1	£87.7
Tesco, Baughurst	£0.0	£2.1	£0.1	£0.0	£0.0	£0.0	£0.0	£2.2
Tesco Express, Oakridge Road	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
	£130.6	**£8.7**	**£1.4**	**£13.0**	**£11.7**	**£5.3**	**£1.7**	**£172.5**
BOROUGH AREA SUBTOTAL:	**£273.9**	**£59.1**	**£6.5**	**£26.2**	**£17.1**	**£9.1**	**£15.2**	**£407.0**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£5.9	£0.0	£0.0	£5.9
Alton	£0.0	£0.0	£0.0	£0.0	£15.8	£0.9	£0.0	£16.8
Andover	£0.0	£0.0	£0.5	£12.7	£1.8	£0.0	£0.0	£15.0
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.5	£0.0	£0.4	£0.0	£0.0	£4.9	£0.6	£6.4
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£0.1	£3.7
Farnborough	£0.0	£0.2	£0.0	£0.0	£0.4	£0.5	£0.0	£1.1
Farnham	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.5
Fleet	£0.4	£0.0	£0.0	£0.0	£0.0	£4.5	£0.0	£5.0
Hook	£0.4	£0.0	£0.0	£0.1	£0.7	£29.0	£0.5	£30.7
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8
Newbury	£0.7	£2.7	£29.5	£3.9	£0.0	£0.0	£0.2	£36.9
Reading	£1.6	£0.6	£0.4	£0.0	£0.0	£0.0	£1.8	£4.4
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.4	£0.5	£0.0	£0.0	£0.0	£0.1	£1.0
Winchester	£0.3	£0.0	£0.1	£1.4	£22.3	£0.0	£0.1	£24.2
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.8	£1.0
All other shops and stores	£1.9	£0.5	£0.4	£0.0	£3.8	£6.5	£3.4	£16.5
OUTSIDE BOROUGH SUBTOTAL:	**£6.2**	**£4.3**	**£32.0**	**£18.2**	**£51.5**	**£49.9**	**£8.4**	**£170.6**
TOTAL MARKET SHARE:	**£280.1**	**£63.5**	**£38.5**	**£44.4**	**£68.6**	**£59.0**	**£23.6**	**£577.6**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 9: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2029

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£14.8	£0.2	£0.4	£0.3	£0.0	£0.0	£0.2	£15.9
Tesco Metro	£1.5	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.0
Iceland	£4.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.1	£5.5
Marks & Spencers	£5.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£5.2
Other Convenience Stores	£3.2	£0.2	£0.0	£0.0	£0.3	£0.6	£0.2	£4.5
	£28.6	**£2.2**	**£0.5**	**£0.3**	**£0.3**	**£0.6**	**£0.6**	**£33.0**
CHINEHAM DISTRICT CENTRE								
Tesco	£50.0	£9.3	£0.1	£0.9	£1.2	£1.7	£4.8	£68.0
Marks & Spencer	£4.8	£1.1	£0.0	£0.1	£0.0	£0.1	£0.3	£6.5
Other Convenience Stores	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5
	£56.3	**£10.4**	**£0.1**	**£1.0**	**£1.2**	**£1.8**	**£5.1**	**£76.0**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£45.0	£2.8	£0.2	£1.7	£1.6	£1.5	£0.3	£53.1
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£45.0	**£2.8**	**£0.2**	**£1.7**	**£1.6**	**£1.5**	**£0.3**	**£53.1**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£1.7
Other Convenience Stores	£0.0	£0.0	£0.0	£1.8	£0.2	£0.0	£0.0	£2.0
	£0.0	**£0.0**	**£0.0**	**£3.5**	**£0.2**	**£0.0**	**£0.0**	**£3.8**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.9	£31.8	£1.4	£0.0	£0.0	£0.0	£6.3	£41.4
Other Convenience Stores	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£0.1	£2.7
	£1.9	**£34.5**	**£1.4**	**£0.0**	**£0.0**	**£0.0**	**£6.3**	**£44.1**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.4	£0.2	£0.3	£5.8	£0.0	£0.0	£0.0	£6.6
Other Convenience Stores	£0.1	£0.0	£0.0	£0.7	£0.2	£0.0	£0.0	£1.0
	£0.5	**£0.2**	**£0.3**	**£6.5**	**£0.2**	**£0.0**	**£0.0**	**£7.5**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.5	£0.0	£0.0	£0.0	£0.0	£2.5
	£0.0	**£0.0**	**£2.5**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.5**
OTHER LOCAL SHOPS/PARADES	**£15.1**	**£1.9**	**£0.2**	**£0.4**	**£2.0**	**£0.0**	**£1.4**	**£21.0**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7
Lidl, Churchill Way West	£2.6	£0.6	£0.4	£0.2	£0.2	£0.0	£0.1	£4.2
Morrisons, Worting Road	£55.7	£4.5	£0.8	£7.0	£2.9	£2.9	£1.6	£75.4
Sainsbury's, Wallop Drive	£71.2	£1.2	£0.1	£6.1	£9.0	£2.5	£0.1	£90.2
Tesco, Baughurst	£0.0	£2.2	£0.1	£0.0	£0.0	£0.0	£0.0	£2.3
Tesco Express, Oakridge Road	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
	£134.4	**£9.0**	**£1.4**	**£13.4**	**£12.0**	**£5.4**	**£1.8**	**£177.3**
BOROUGH AREA SUBTOTAL:	**£281.7**	**£60.8**	**£6.6**	**£26.9**	**£17.5**	**£9.2**	**£15.6**	**£418.4**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£6.1	£0.0	£0.0	£6.1
Alton	£0.0	£0.0	£0.0	£0.0	£16.2	£1.0	£0.0	£17.2
Andover	£0.0	£0.0	£0.5	£13.0	£1.8	£0.0	£0.0	£15.4
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.5	£0.0	£0.4	£0.0	£0.0	£5.0	£0.6	£6.5
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.6	£0.1	£3.8
Farnborough	£0.0	£0.2	£0.0	£0.0	£0.4	£0.6	£0.0	£1.1
Farnham	£0.3	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.5
Fleet	£0.5	£0.0	£0.0	£0.0	£0.0	£4.6	£0.0	£5.1
Hook	£0.5	£0.0	£0.0	£0.1	£0.7	£29.6	£0.6	£31.4
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9
Newbury	£0.8	£2.8	£30.3	£4.0	£0.0	£0.0	£0.2	£37.9
Reading	£1.7	£0.6	£0.4	£0.0	£0.0	£0.0	£1.8	£4.5
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.5	£0.5	£0.0	£0.0	£0.0	£0.1	£1.0
Winchester	£0.3	£0.0	£0.1	£1.5	£22.9	£0.0	£0.1	£24.8
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.8	£1.0
All other shops and stores	£1.9	£0.5	£0.4	£0.0	£3.9	£6.7	£3.5	£16.9
OUTSIDE BOROUGH SUBTOTAL:	**£6.4**	**£4.5**	**£32.9**	**£18.7**	**£52.8**	**£51.0**	**£8.6**	**£174.9**
TOTAL MARKET SHARE:	**£288.1**	**£65.3**	**£39.5**	**£45.6**	**£70.4**	**£60.2**	**£24.2**	**£593.2**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 10: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2031

	CCA (Zones 1 - 4)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL FROM STUDY AREA
BASINGSTOKE TOWN CENTRE								
Sainsbury's	£15.1	£0.2	£0.4	£0.3	£0.0	£0.0	£0.2	£16.3
Tesco Metro	£1.6	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£2.0
Iceland	£4.2	£1.4	£0.0	£0.0	£0.0	£0.0	£0.1	£5.6
Marks & Spencers	£5.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£5.4
Other Convenience Stores	£3.3	£0.2	£0.0	£0.0	£0.3	£0.6	£0.3	£4.6
	£29.3	**£2.2**	**£0.5**	**£0.3**	**£0.3**	**£0.6**	**£0.6**	**£33.9**
CHINEHAM DISTRICT CENTRE								
Tesco	£51.3	£9.6	£0.1	£0.9	£1.3	£1.7	£5.0	£69.8
Marks & Spencer	£5.0	£1.1	£0.0	£0.1	£0.0	£0.1	£0.3	£6.6
Other Convenience Stores	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6
	£57.8	**£10.7**	**£0.1**	**£1.1**	**£1.3**	**£1.8**	**£5.3**	**£78.0**
BRIGHTON HILL DISTRICT CENTRE								
Asda	£46.2	£2.8	£0.2	£1.8	£1.6	£1.5	£0.3	£54.5
Other Convenience Stores	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£46.2	**£2.8**	**£0.2**	**£1.8**	**£1.6**	**£1.5**	**£0.3**	**£54.5**
WHITCHURCH DISTRICT CENTRE								
Co-Op, Bell Street	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£1.8
Other Convenience Stores	£0.0	£0.0	£0.0	£1.8	£0.2	£0.0	£0.0	£2.1
	£0.0	**£0.0**	**£0.0**	**£3.6**	**£0.2**	**£0.0**	**£0.0**	**£3.9**
TADLEY DISTRICT CENTRE								
Sainsbury's, Mulfords Hill	£1.9	£32.7	£1.4	£0.0	£0.0	£0.0	£6.4	£42.4
Other Convenience Stores	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.1	£2.8
	£1.9	**£35.4**	**£1.4**	**£0.0**	**£0.0**	**£0.0**	**£6.5**	**£45.2**
OVERTON DISTRICT CENTRE								
Co-Op, Winchester Street	£0.4	£0.2	£0.3	£5.9	£0.0	£0.0	£0.0	£6.7
Other Convenience Stores	£0.1	£0.0	£0.0	£0.7	£0.2	£0.0	£0.0	£1.0
	£0.5	**£0.2**	**£0.3**	**£6.7**	**£0.2**	**£0.0**	**£0.0**	**£7.7**
KINGSCLERE LOCAL CENTRE								
Other Convenience Stores	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£2.6
	£0.0	**£0.0**	**£2.6**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.6**
OTHER LOCAL SHOPS/PARADES	**£15.5**	**£1.9**	**£0.2**	**£0.4**	**£2.0**	**£0.0**	**£1.5**	**£21.5**
OUT OF CENTRE								
Co-op, Giles Walk, Tadley	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Co-op, Winklebury Way	£2.6	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7
Lidl, Churchill Way West	£2.7	£0.6	£0.4	£0.3	£0.2	£0.0	£0.1	£4.3
Morrisons, Worting Road	£57.2	£4.6	£0.8	£7.2	£2.9	£2.9	£1.6	£77.3
Sainsbury's, Wallop Drive	£73.0	£1.3	£0.1	£6.2	£9.2	£2.5	£0.1	£92.5
Tesco, Baughurst	£0.0	£2.2	£0.1	£0.0	£0.0	£0.0	£0.0	£2.3
Tesco Express, Oakridge Road	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
	£137.8	**£9.2**	**£1.4**	**£13.7**	**£12.3**	**£5.5**	**£1.8**	**£181.8**
BOROUGH AREA SUBTOTAL:	**£289.0**	**£62.4**	**£6.8**	**£27.5**	**£18.0**	**£9.4**	**£15.9**	**£429.0**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£6.2	£0.0	£0.0	£6.2
Alton	£0.0	£0.0	£0.0	£0.0	£16.6	£1.0	£0.0	£17.6
Andover	£0.0	£0.0	£0.5	£13.3	£1.9	£0.0	£0.0	£15.7
Bordon	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1
Camberley	£0.5	£0.0	£0.4	£0.0	£0.0	£5.1	£0.6	£6.7
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£0.1	£3.8
Farnborough	£0.0	£0.2	£0.0	£0.0	£0.5	£0.6	£0.0	£1.2
Farnham	£0.3	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.5
Fleet	£0.5	£0.0	£0.0	£0.0	£0.0	£4.7	£0.0	£5.2
Hook	£0.5	£0.0	£0.0	£0.1	£0.7	£30.1	£0.6	£32.0
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9
Newbury	£0.8	£2.8	£31.0	£4.0	£0.0	£0.0	£0.2	£38.9
Reading	£1.7	£0.6	£0.4	£0.0	£0.0	£0.0	£1.9	£4.6
Southampton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thatcham	£0.0	£0.5	£0.5	£0.0	£0.0	£0.0	£0.1	£1.1
Winchester	£0.3	£0.0	£0.1	£1.5	£23.4	£0.0	£0.1	£25.4
Wokingham	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.8	£1.0
All other shops and stores	£2.0	£0.5	£0.4	£0.0	£4.0	£6.8	£3.6	£17.3
OUTSIDE BOROUGH SUBTOTAL:	**£6.6**	**£4.6**	**£33.7**	**£19.2**	**£54.1**	**£51.9**	**£8.8**	**£178.8**
TOTAL MARKET SHARE:	**£295.6**	**£67.0**	**£40.5**	**£46.7**	**£72.0**	**£61.4**	**£24.8**	**£607.8**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 11: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1-10)

	2015	2017	2022	2027	2029	2031
BASINGSTOKE TOWN CENTRE	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
DISTRICT CENTRES:						
Chineham District Centre:	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Brighton Hill District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whitchurch District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tadley District Centre:	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Overton District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES, SHOPS & PARADES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE STORES	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%

Source: CJ Estimate based on survey evidence, previous retail studies and judgement as to the likely trade draw of stores and centres from outside the defined study area (based on location, scale, range and quality of offer compared with competing centres/stores).

TABLE 12: TOTAL 'POTENTIAL' TURNOVER BASED ON MARKET SHARE AND TRADE DRAW ANALYSIS

	'Benchmark' Turnover 2015	2015	2017	2022	2027	2029	2031
BASINGSTOKE TOWN CENTRE	£48.4	£29.8	£30.6	£32.8	£35.4	£36.3	£37.3
CHINEHAM DISTRICT CENTRE	£50.8	£63.0	£64.8	£69.3	£74.7	£76.8	£78.8
BRIGHTON HILL DISTRICT CENTRE	£30.5	£43.6	£44.8	£47.9	£51.7	£53.1	£54.5
WHITCHURCH DISTRICT CENTRE	£1.8	£3.2	£3.2	£3.4	£3.7	£3.8	£3.9
TADLEY DISTRICT CENTRE	£37.7	£41.6	£42.8	£45.8	£49.3	£50.7	£52.0
OVERTON DISTRICT CENTRE	£3.0	£6.3	£6.5	£6.9	£7.4	£7.5	£7.7
KINGSCLERE LOCAL CENTRE	£0.9	£2.1	£2.1	£2.3	£2.4	£2.5	£2.6
OTHER LOCAL SHOPS/PARADES	£9.2	£17.2	£17.7	£18.9	£20.4	£21.0	£21.5
ALL BOROUGH CENTRES: SUB-TOTAL	£182.3	**£206.8**	**£212.4**	**£227.3**	**£244.9**	**£251.7**	**£258.2**
OUT OF CENTRE: SUB-TOTAL	£120.9	**£147.4**	**£151.3**	**£151.3**	**£174.2**	**£179.1**	**£183.6**
BOROUGH AREA TOTAL:	£303.2	**£354.2**	**£363.7**	**£378.6**	**£419.1**	**£430.8**	**£441.8**

Source: Total turnover estimates derived from market share and trade draw analysis

TABLE 13: CONVENIENCE GOODS CAPACITY ASSESSMENT

ASSUME 'EQUILIBRIUM' AT 2015

		2015	2017	2022	2027	2029	2031
STEP 1:	**TOTAL FORECAST 'POTENTIAL' TURNOVER (£ m):**	£354.2	£363.7	£378.6	£419.1	£430.8	£441.8
STEP 2:	**TOTAL FORECAST 'BENCHMARK' TURNOVER (£ m):**	£354.2	£352.1	£349.9	£351.3	£352.1	£352.8
STEP 3:	**TOTAL FORECAST RESIDUAL EXPENDITURE (£m):**	£0.0	£11.6	£28.6	£67.8	£78.8	£89.0
STEP 4:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£ m):**	£45.1	£44.9	£44.6	£44.8	£44.9	£45.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):**	**-£45.1**	**-£33.2**	**-£15.9**	**£23.0**	**£33.9**	**£44.1**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**						
	CAPACITY FOR NEW SUPERSTORE (sq m):						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,425	£12,338	£12,400	£12,425	£12,450
	(ii) Net Floorspace Capacity (sq m):	**-3,611**	**-2,675**	**-1,290**	**1,855**	**2,727**	**3,539**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-5,159	-3,821	-1,843	2,650	3,896	5,056
	CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,958	£6,909	£6,944	£6,958	£6,972
	(ii) Net Floorspace Capacity (sq m):	**-6,448**	**-4,776**	**-2,303**	**3,312**	**4,870**	**6,320**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-9,212	-6,823	-3,290	4,732	6,958	9,029

Step 1: identifies the total ‘potential’ turnover of all existing convenience goods floorspace at 2015 (based on Table 11). The growth in ‘potential’ turnover up to 2031 assumes constant market shares over the forecast period.

Step 2: sets out the total ‘benchmark’ turnover of existing convenience goods floorspace at 2015. Make an allowance for annual floorspace ‘productivity’ growth of:

2015-2017:	-0.3%
2018-2021:	-0.2%
2022-2031:	0.1%

Step 3: sets out the forecast residual expenditure capacity available to support new convenience goods floorspace over the forecast period (i.e. the difference between the ‘benchmark’ and ‘potential’ turnovers).

Step 4: identifies the forecast convenience goods turnover of all committed floorspace that had planning permission at the time of preparing this assessment and stores trading since 2012 (based on Table 2, Appendix 4). Allow for growth in 'productivity' of all committed floorspace (as above).

Step 6: shows the net residual expenditure available to support new convenience goods floorspace after taking account of all new commitments.

Step 7: forecasts the capacity for major new superstore and/or smaller format supermarket floorspace. This assumes a major superstore operator achieves an average sales density of circa £12,500 per m^2 in 2015, which is based on the published average sales figures for Asda, Tesco, Sainsbury's, Morrisons and Waitrose. For a smaller format supermarket and/or deep discounter we have assumed an average sales density of £7,000 per m^2 and this is based on the published sales levels for a range of operators including, Co-Op, Budgens, Lidl and Aldi.

APPENDIX 3: COMPARISON GOODS CAPACITY ASSESSMENT

Comparison Goods Capacity Assessment

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2015 - 2031)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031	2015 - 31
Zone 1:	Central Basingstoke	27,833	28,479	30,011	31,304	31,761	32,191	15.7%
Zone 2:	Basingstoke West	42,927	43,913	46,191	48,131	48,820	49,430	15.1%
Zone 3:	Basingstoke East	34,103	34,898	36,739	38,291	38,825	39,320	15.3%
Zone 4:	Basingstoke North West	12,383	12,669	13,358	13,928	14,130	14,325	15.7%
Zone 5:	Tadley	23,234	23,767	24,998	26,041	26,410	26,743	15.1%
Zone 6:	Newbury South	13,695	13,982	14,658	15,217	15,418	15,609	14.0%
Zone 7:	Whitchurch	17,013	17,318	18,059	18,687	18,911	19,115	12.4%
Zone 8:	Basingstoke South	24,687	25,053	25,956	26,819	27,129	27,416	11.1%
Zone 9:	Hook	23,519	23,761	24,367	24,839	25,003	25,156	7.0%
Zone 10:	Basingstoke North East	8,300	8,457	8,834	9,153	9,265	9,370	12.9%
TOTAL:		**227,694**	**232,297**	**243,171**	**252,410**	**255,672**	**258,675**	**13.6%**
Zones 1-4	**'CENTRAL' CATCHMENT AREA (CCA):**	117,246	119,959	126,299	131,654	133,536	135,266	15.4%

Sources: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Base year population derived from ONS 2012-based Sub National Population Projections released in May 2014.

Projections are based on Experian's revised *'demographic component model'*. This takes into account 2012 ONS Sub National Population Projections. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate. Basingstoke & Deane Council has confirmed that the most recent annual dwelling allocations for the District are broadly based on the projected increase in population identified by Experian and that there will be no population growth arising from new residential development over and above the Experian projections.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS FOR COMPARISON GOODS (2013 prices)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031
Zone 1:	Central Basingstoke	£3,175	£3,321	£3,769	£4,407	£4,748	£5,072
Zone 2:	Basingstoke West	£2,959	£3,096	£3,513	£4,107	£4,425	£4,727
Zone 3:	Basingstoke East	£3,163	£3,309	£3,755	£4,390	£4,730	£5,053
Zone 4:	Basingstoke North West	£3,655	£3,823	£4,338	£5,072	£5,464	£5,838
Zone 5:	Tadley	£3,864	£4,042	£4,587	£5,363	£5,777	£6,172
Zone 6:	Newbury South	£4,048	£4,235	£4,805	£5,618	£6,053	£6,467
Zone 7:	Whitchurch	£3,678	£3,847	£4,365	£5,104	£5,499	£5,875
Zone 8:	Basingstoke South	£4,205	£4,398	£4,991	£5,835	£6,287	£6,716
Zone 9:	Hook	£3,857	£4,035	£4,578	£5,353	£5,767	£6,161
Zone 10:	Basingstoke North East	£4,127	£4,316	£4,898	£5,727	£6,170	£6,592

Source: Average spend per capita estimates are in 2013 prices and derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 12 (October 2014)*. Please note that an allowance has been made at the base year and over the forecast period for expenditure on Special Forms of Trading (SFT), including Internet Shopping, based on the research and forecasts by Experian Business Strategies (Briefing Note 12) and by reference to the HTIS. Refer to report for more detailed commentary.

TABLE 3: TOTAL FORECAST GROWTH IN COMPARISON GOODS EXPENDITURE, 2015 - 2031 (£ million)

ZONE:	BROAD GEOGRAPHIC AREA:	2015	2017	2022	2027	2029	2031	2015 - 31
Zone 1:	Central Basingstoke	£88.4	£94.6	£113.1	£138.0	£150.8	£163.3	84.7%
Zone 2:	Basingstoke West	£127.0	£135.9	£162.3	£197.7	£216.0	£233.7	83.9%
Zone 3:	Basingstoke East	£107.9	£115.5	£137.9	£168.1	£183.6	£198.7	84.2%
Zone 4:	Basingstoke North West	£45.3	£48.4	£57.9	£70.6	£77.2	£83.6	84.8%
Zone 5:	Tadley	£89.8	£96.1	£114.7	£139.7	£152.6	£165.1	83.9%
Zone 6:	Newbury South	£55.4	£59.2	£70.4	£85.5	£93.3	£100.9	82.1%
Zone 7:	Whitchurch	£62.6	£66.6	£78.8	£95.4	£104.0	£112.3	79.5%
Zone 8:	Basingstoke South	£103.8	£110.2	£129.5	£156.5	£170.5	£184.1	77.4%
Zone 9:	Hook	£90.7	£95.9	£111.6	£133.0	£144.2	£155.0	70.9%
Zone 10:	Basingstoke North East	£34.3	£36.5	£43.3	£52.4	£57.2	£61.8	80.3%
TOTAL:		**£805.1**	**£858.9**	**£1,019.5**	**£1,236.8**	**£1,349.4**	**£1,458.4**	**81.1%**
Zones 1-4	**'CENTRAL' CATCHMENT AREA (CCA):**	£368.5	£394.4	£471.3	£574.4	£627.6	£679.2	84.3%

Source: Expenditure calcualted from Tables 1 & 2.

TABLE 4: COMPARISON GOODS - 2012 MARKET SHARE ANALYSIS (%)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
BASINGSTOKE TOWN CENTRE	47.0%	43.8%	11.9%	33.0%	18.9%	38.8%	30.5%
CHINEHAM DISTRICT CENTRE	5.5%	4.5%	0.3%	0.6%	0.3%	3.5%	7.7%
BRIGHTON HILL DISTRICT CENTRE	3.9%	1.4%	0.4%	1.5%	1.0%	0.9%	0.2%
WHITCHURCH DISTRICT CENTRE	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%
TADLEY DISTRICT CENTRE	0.4%	13.5%	1.1%	0.3%	0.0%	0.1%	7.3%
OVERTON DISTRICT CENTRE	0.0%	0.2%	0.2%	3.9%	0.0%	0.0%	0.0%
KINGSCLERE LOCAL CENTRE	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%
OTHER LOCAL SHOPS/PARADES	0.9%	0.3%	0.0%	1.1%	0.2%	0.4%	1.1%
OUT OF CENTRE DESTINATIONS:	32.5%	14.2%	4.1%	13.2%	14.0%	15.3%	9.3%
BOROUGH AREA SUBTOTAL:	**90.3%**	**77.9%**	**20.7%**	**57.3%**	**34.5%**	**59.0%**	**56.3%**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH							
Aldershot	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.0%
Alresford	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%
Alton	0.0%	0.0%	0.0%	0.0%	8.8%	0.6%	0.0%
Andover	0.0%	0.0%	0.2%	20.3%	3.5%	0.0%	0.0%
Bordon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camberley	0.3%	0.2%	0.5%	0.3%	0.3%	2.6%	2.4%
Elvetham Heath, Fleet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Farnborough	0.4%	0.6%	0.0%	0.0%	0.8%	2.5%	0.9%
Farnh North Walsham	0.0%	0.3%	0.0%	0.0%	1.1%	2.5%	0.0%
Fleet Stalham	0.0%	0.0%	0.0%	0.1%	0.0%	5.9%	0.7%
Hook Other	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.1%
Mortimer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Newbury	0.2%	6.7%	65.1%	5.3%	0.2%	0.6%	0.9%
Readi Lowestoft Town Centre	4.5%	11.5%	5.3%	2.1%	1.5%	7.3%	26.6%
South Lowestoft Out of Centre	1.5%	0.7%	1.1%	4.9%	7.9%	0.4%	0.3%
Thatcham	0.0%	0.2%	1.3%	0.0%	0.0%	0.0%	0.1%
Winchester	0.8%	0.3%	1.0%	6.2%	26.7%	0.1%	0.5%
Wokingham	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%
All other shops and stores	1.8%	1.4%	5.0%	3.5%	7.8%	14.3%	8.2%
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**9.7%**	**22.1%**	**79.3%**	**42.7%**	**65.6%**	**41.0%**	**43.7%**
TOTAL:	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Results of NEMS Household Telephone Interview Survey (April 2012) commissioned by Strategic Perspectives.

TABLE 5: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2015 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£173.3	£39.3	£6.6	£20.6	£19.6	£35.2	£10.5	£305.1
CHINEHAM DISTRICT CENTRE	£20.4	£4.0	£0.2	£0.4	£0.4	£3.1	£2.6	£31.1
BRIGHTON HILL DISTRICT CENTRE	£14.5	£1.3	£0.2	£0.9	£1.0	£0.8	£0.1	£18.8
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£2.3
TADLEY DISTRICT CENTRE	£1.5	£12.1	£0.6	£0.2	£0.0	£0.1	£2.5	£17.1
OVERTON DISTRICT CENTRE	£0.1	£0.2	£0.1	£2.4	£0.0	£0.0	£0.0	£2.8
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£1.5
OTHER LOCAL SHOPS/PARADES	£3.3	£0.3	£0.0	£0.7	£0.2	£0.3	£0.4	£5.3
OUT OF CENTRE DESTINATIONS:	£119.6	£12.7	£2.3	£8.3	£14.6	£13.9	£3.2	£174.6
BOROUGH AREA SUBTOTAL:	**£332.9**	**£69.9**	**£11.5**	**£35.8**	**£35.8**	**£53.5**	**£19.3**	**£558.6**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.4
Alresford	£0.0	£0.0	£0.0	£0.0	£7.0	£0.0	£0.0	£7.0
Alton	£0.0	£0.0	£0.0	£0.0	£9.1	£0.5	£0.0	£9.6
Andover	£0.1	£0.0	£0.1	£12.7	£3.6	£0.0	£0.0	£16.5
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£1.2	£0.2	£0.3	£0.2	£0.3	£2.3	£0.8	£5.4
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£1.3	£0.5	£0.0	£0.0	£0.8	£2.3	£0.3	£5.3
Farnh North Walsham	£0.1	£0.3	£0.0	£0.0	£1.2	£2.3	£0.0	£3.8
Fleet Stalham	£0.0	£0.0	£0.0	£0.1	£0.0	£5.3	£0.2	£5.7
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£0.0	£3.7
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.7
Newbury	£0.8	£6.0	£36.1	£3.3	£0.2	£0.6	£0.3	£47.4
Reading	£16.7	£10.4	£3.0	£1.3	£1.5	£6.7	£9.1	£48.6
Southampton	£5.5	£0.6	£0.6	£3.1	£8.2	£0.4	£0.1	£18.5
Thatcham	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.0	£0.9
Winchester	£2.8	£0.3	£0.5	£3.9	£27.7	£0.1	£0.2	£35.4
Wokingham	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£0.9
All other shops and stores	£6.7	£1.2	£2.8	£2.2	£8.1	£12.9	£2.8	£36.7
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£35.7**	**£19.9**	**£44.0**	**£26.7**	**£68.0**	**£37.2**	**£15.0**	**£246.5**
TOTAL:	**£368.6**	**£89.8**	**£55.4**	**£62.6**	**£103.8**	**£90.7**	**£34.2**	**£805.1**

Source: Derived by applying the market share analysis (Table 4) to the available expenditure at the base year (Table 3)

TABLE 6: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2017 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£185.5	£42.0	£7.1	£22.0	£20.8	£37.2	£11.2	£325.8
CHINEHAM DISTRICT CENTRE	£21.8	£4.3	£0.2	£0.4	£0.4	£3.3	£2.8	£33.2
BRIGHTON HILL DISTRICT CENTRE	£15.6	£1.4	£0.3	£1.0	£1.1	£0.8	£0.1	£20.1
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0	£2.4
TADLEY DISTRICT CENTRE	£1.7	£13.0	£0.7	£0.2	£0.0	£0.1	£2.7	£18.3
OVERTON DISTRICT CENTRE	£0.1	£0.2	£0.1	£2.6	£0.0	£0.0	£0.0	£3.0
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£1.6
OTHER LOCAL SHOPS/PARADES	£3.6	£0.3	£0.0	£0.8	£0.2	£0.3	£0.4	£5.7
OUT OF CENTRE DESTINATIONS:	£128.0	£13.6	£2.4	£8.8	£15.5	£14.7	£3.4	£186.4
BOROUGH AREA SUBTOTAL:	**£356.2**	**£74.8**	**£12.2**	**£38.2**	**£38.0**	**£56.5**	**£20.6**	**£596.5**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								£0.0
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.4
Alresford	£0.0	£0.0	£0.0	£0.0	£7.5	£0.0	£0.0	£7.5
Alton	£0.0	£0.0	£0.0	£0.0	£9.7	£0.6	£0.0	£10.2
Andover	£0.1	£0.0	£0.1	£13.5	£3.9	£0.0	£0.0	£17.5
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£1.3	£0.2	£0.3	£0.2	£0.3	£2.5	£0.9	£5.7
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£1.4	£0.5	£0.0	£0.0	£0.9	£2.4	£0.3	£5.6
Farnh North Walsham	£0.1	£0.3	£0.0	£0.0	£1.2	£2.4	£0.0	£4.1
Fleet Stalham	£0.0	£0.0	£0.0	£0.1	£0.0	£5.6	£0.3	£6.0
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£0.0	£3.9
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8
Newbury	£0.9	£6.5	£38.5	£3.5	£0.3	£0.6	£0.3	£50.6
Reading	£17.9	£11.1	£3.2	£1.4	£1.6	£7.0	£9.7	£51.8
Southampton	£5.9	£0.6	£0.6	£3.3	£8.7	£0.4	£0.1	£19.7
Thatcham	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.0	£1.0
Winchester	£3.0	£0.3	£0.6	£4.1	£29.4	£0.1	£0.2	£37.6
Wokingham	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£0.9
All other shops and stores	£7.2	£1.3	£2.9	£2.3	£8.6	£13.7	£3.0	£39.0
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£38.2**	**£21.3**	**£47.0**	**£28.5**	**£72.2**	**£39.4**	**£15.9**	**£262.4**
TOTAL:	**£394.4**	**£96.1**	**£59.2**	**£66.6**	**£110.2**	**£95.9**	**£36.5**	**£858.9**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 7: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2022 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£221.6	£50.2	£8.4	£26.0	£24.5	£43.3	£13.2	£387.2
CHINEHAM DISTRICT CENTRE	£26.1	£5.2	£0.2	£0.5	£0.4	£3.9	£3.3	£39.5
BRIGHTON HILL DISTRICT CENTRE	£18.6	£1.6	£0.3	£1.2	£1.2	£1.0	£0.1	£24.0
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£2.9
TADLEY DISTRICT CENTRE	£2.0	£15.5	£0.8	£0.2	£0.0	£0.1	£3.2	£21.8
OVERTON DISTRICT CENTRE	£0.1	£0.2	£0.2	£3.1	£0.0	£0.0	£0.0	£3.6
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£1.9
OTHER LOCAL SHOPS/PARADES	£4.3	£0.4	£0.0	£0.9	£0.3	£0.4	£0.5	£6.7
OUT OF CENTRE DESTINATIONS:	£153.0	£16.2	£2.9	£10.4	£18.2	£17.1	£4.0	£221.8
BOROUGH AREA SUBTOTAL:	**£425.6**	**£89.3**	**£14.6**	**£45.2**	**£44.6**	**£65.8**	**£24.4**	**£709.4**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								£0.0
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.5
Alresford	£0.0	£0.0	£0.0	£0.0	£8.8	£0.0	£0.0	£8.8
Alton	£0.0	£0.0	£0.0	£0.0	£11.4	£0.7	£0.0	£12.0
Andover	£0.1	£0.0	£0.1	£16.0	£4.6	£0.0	£0.0	£20.7
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£1.6	£0.3	£0.3	£0.2	£0.4	£2.9	£1.1	£6.7
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£1.7	£0.7	£0.0	£0.0	£1.0	£2.8	£0.4	£6.6
Farnh North Walsham	£0.1	£0.4	£0.0	£0.0	£1.5	£2.8	£0.0	£4.8
Fleet Stalham	£0.0	£0.0	£0.0	£0.1	£0.0	£6.5	£0.3	£7.0
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	£0.0	£4.6
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9
Newbury	£1.1	£7.7	£45.8	£4.2	£0.3	£0.7	£0.4	£60.2
Reading	£21.4	£13.2	£3.8	£1.6	£1.9	£8.2	£11.5	£61.6
Southampton	£7.1	£0.7	£0.8	£3.9	£10.2	£0.5	£0.2	£23.3
Thatcham	£0.0	£0.2	£0.9	£0.0	£0.0	£0.0	£0.0	£1.2
Winchester	£3.6	£0.4	£0.7	£4.9	£34.5	£0.1	£0.2	£44.3
Wokingham	£0.6	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£1.1
All other shops and stores	£8.6	£1.6	£3.5	£2.7	£10.2	£15.9	£3.6	£46.0
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£45.7**	**£25.4**	**£55.9**	**£33.7**	**£84.9**	**£45.8**	**£18.9**	**£310.2**
TOTAL:	**£471.3**	**£114.6**	**£70.4**	**£78.8**	**£129.6**	**£111.6**	**£43.3**	**£1,019.6**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 8: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2027 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£270.1	£61.1	£10.2	£31.5	£29.6	£51.6	£16.0	£470.1
CHINEHAM DISTRICT CENTRE	£31.8	£6.3	£0.2	£0.6	£0.5	£4.6	£4.0	£48.0
BRIGHTON HILL DISTRICT CENTRE	£22.7	£2.0	£0.4	£1.4	£1.5	£1.2	£0.1	£29.2
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£3.5	£0.0	£0.0	£0.0	£3.5
TADLEY DISTRICT CENTRE	£2.4	£18.9	£0.9	£0.3	£0.0	£0.2	£3.9	£26.5
OVERTON DISTRICT CENTRE	£0.1	£0.3	£0.2	£3.7	£0.0	£0.0	£0.0	£4.3
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£2.3
OTHER LOCAL SHOPS/PARADES	£5.2	£0.5	£0.0	£1.1	£0.3	£0.5	£0.6	£8.2
OUT OF CENTRE DESTINATIONS:	£186.4	£19.8	£3.5	£12.6	£22.0	£20.4	£4.9	£269.6
BOROUGH AREA SUBTOTAL:	**£518.8**	**£108.7**	**£17.7**	**£54.6**	**£53.9**	**£78.4**	**£29.5**	**£861.6**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								£0.0
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.5
Alresford	£0.0	£0.0	£0.0	£0.0	£10.6	£0.0	£0.0	£10.6
Alton	£0.0	£0.0	£0.0	£0.0	£13.7	£0.8	£0.0	£14.5
Andover	£0.1	£0.0	£0.1	£19.3	£5.5	£0.0	£0.0	£25.1
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£1.9	£0.3	£0.4	£0.3	£0.5	£3.4	£1.3	£8.1
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£2.1	£0.8	£0.0	£0.0	£1.2	£3.4	£0.5	£8.0
Farnh North Walsham	£0.1	£0.5	£0.0	£0.0	£1.8	£3.3	£0.0	£5.7
Fleet Stalham	£0.0	£0.0	£0.0	£0.1	£0.0	£7.8	£0.4	£8.3
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£5.4	£0.1	£5.4
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£1.1
Newbury	£1.3	£9.4	£55.7	£5.1	£0.4	£0.8	£0.5	£73.1
Reading	£26.0	£16.1	£4.6	£2.0	£2.3	£9.8	£14.0	£74.7
Southampton	£8.6	£0.9	£0.9	£4.7	£12.4	£0.6	£0.2	£28.2
Thatcham	£0.0	£0.3	£1.1	£0.0	£0.0	£0.0	£0.0	£1.4
Winchester	£4.3	£0.5	£0.8	£5.9	£41.7	£0.1	£0.2	£53.6
Wokingham	£0.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4	£1.3
All other shops and stores	£10.4	£1.9	£4.2	£3.3	£12.3	£19.0	£4.3	£55.4
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£55.7**	**£30.9**	**£67.8**	**£40.7**	**£102.6**	**£54.6**	**£22.9**	**£375.2**
TOTAL:	**£574.4**	**£139.6**	**£85.5**	**£95.4**	**£156.5**	**£133.0**	**£52.4**	**£1,236.8**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 9: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2029 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£295.2	£66.8	£11.1	£34.3	£32.2	£56.0	£17.5	£513.0
CHINEHAM DISTRICT CENTRE	£34.7	£6.9	£0.3	£0.6	£0.6	£5.0	£4.4	£52.4
BRIGHTON HILL DISTRICT CENTRE	£24.8	£2.1	£0.4	£1.5	£1.6	£1.3	£0.1	£31.9
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£3.8
TADLEY DISTRICT CENTRE	£2.6	£20.6	£1.0	£0.3	£0.0	£0.2	£4.2	£29.0
OVERTON DISTRICT CENTRE	£0.1	£0.3	£0.2	£4.0	£0.0	£0.0	£0.0	£4.7
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£2.5
OTHER LOCAL SHOPS/PARADES	£5.7	£0.5	£0.0	£1.2	£0.4	£0.5	£0.6	£8.9
OUT OF CENTRE DESTINATIONS:	£203.7	£21.6	£3.8	£13.7	£23.9	£22.1	£5.3	£294.3
BOROUGH AREA SUBTOTAL:	**£566.8**	**£118.8**	**£19.3**	**£59.6**	**£58.8**	**£85.0**	**£32.2**	**£940.48**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£11.6	£0.0	£0.0	£11.6
Alton	£0.0	£0.0	£0.0	£0.0	£14.9	£0.9	£0.0	£15.8
Andover	£0.1	£0.0	£0.2	£21.1	£6.0	£0.0	£0.0	£27.3
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£2.1	£0.4	£0.4	£0.3	£0.5	£3.7	£1.4	£8.8
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£2.3	£0.9	£0.0	£0.0	£1.3	£3.6	£0.5	£8.7
Farnh North Walsham	£0.1	£0.5	£0.0	£0.0	£1.9	£3.6	£0.0	£6.2
Fleet Stalham	£0.0	£0.0	£0.0	£0.2	£0.0	£8.4	£0.4	£9.0
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8	£0.1	£5.9
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2
Newbury	£1.4	£10.3	£60.7	£5.5	£0.4	£0.9	£0.5	£79.8
Reading	£28.4	£17.6	£5.0	£2.1	£2.5	£10.6	£15.2	£81.4
Southampton	£9.4	£1.0	£1.0	£5.1	£13.5	£0.6	£0.2	£30.8
Thatcham	£0.0	£0.3	£1.2	£0.0	£0.0	£0.0	£0.0	£1.5
Winchester	£4.8	£0.5	£0.9	£6.5	£45.5	£0.1	£0.3	£58.5
Wokingham	£0.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4	£1.5
All other shops and stores	£11.4	£2.1	£4.6	£3.6	£13.4	£20.6	£4.7	£60.4
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£60.8**	**£33.8**	**£74.0**	**£44.4**	**£111.8**	**£59.2**	**£25.0**	**£408.98**
TOTAL:	**£627.7**	**£152.6**	**£93.3**	**£104.0**	**£170.6**	**£144.2**	**£57.1**	**£1,349.5**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 10: COMPARISON GOODS TURNOVER FROM CATCHMENT AREA IN 2031 (£m)

	Central Catchment Area	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
BASINGSTOKE TOWN CENTRE	£319.4	£72.2	£12.0	£37.0	£34.8	£60.2	£18.9	£554.6
CHINEHAM DISTRICT CENTRE	£37.6	£7.4	£0.3	£0.7	£0.6	£5.4	£4.7	£56.7
BRIGHTON HILL DISTRICT CENTRE	£26.8	£2.3	£0.4	£1.7	£1.8	£1.4	£0.1	£34.5
WHITCHURCH DISTRICT CENTRE	£0.0	£0.0	£0.0	£4.1	£0.0	£0.0	£0.0	£4.1
TADLEY DISTRICT CENTRE	£2.8	£22.3	£1.1	£0.4	£0.0	£0.2	£4.5	£31.3
OVERTON DISTRICT CENTRE	£0.2	£0.3	£0.2	£4.4	£0.0	£0.0	£0.0	£5.1
KINGSCLERE LOCAL CENTRE	£0.0	£0.0	£2.6	£0.0	£0.0	£0.0	£0.0	£2.7
OTHER LOCAL SHOPS/PARADES	£6.2	£0.5	£0.0	£1.3	£0.4	£0.5	£0.7	£9.6
OUT OF CENTRE DESTINATIONS:	£220.5	£23.4	£4.2	£14.8	£25.9	£23.7	£5.8	£318.2
BOROUGH AREA SUBTOTAL:	**£613.5**	**£128.5**	**£20.9**	**£64.3**	**£63.4**	**£91.4**	**£34.8**	**£1,016.8**
OTHER CENTRES AND STORES OUTSIDE THE BOROUGH								£0.0
Aldershot	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.6
Alresford	£0.0	£0.0	£0.0	£0.0	£12.5	£0.0	£0.0	£12.5
Alton	£0.0	£0.0	£0.0	£0.0	£16.1	£0.9	£0.0	£17.1
Andover	£0.1	£0.0	£0.2	£22.7	£6.5	£0.0	£0.0	£29.5
Bordon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Camberley	£2.2	£0.4	£0.5	£0.3	£0.5	£4.0	£1.5	£9.5
Elvetham Heath, Fleet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Farnborough	£2.5	£0.9	£0.0	£0.0	£1.4	£3.9	£0.6	£9.3
Farnh North Walsham	£0.2	£0.5	£0.0	£0.0	£2.1	£3.9	£0.0	£6.7
Fleet Stalham	£0.0	£0.0	£0.0	£0.2	£0.0	£9.1	£0.4	£9.7
Hook Other	£0.0	£0.0	£0.0	£0.0	£0.0	£6.3	£0.1	£6.3
Mortimer	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3
Newbury	£1.6	£11.1	£65.7	£6.0	£0.4	£1.0	£0.6	£86.3
Reading	£30.8	£19.0	£5.4	£2.3	£2.7	£11.4	£16.4	£88.0
Southampton	£10.2	£1.1	£1.1	£5.5	£14.6	£0.7	£0.2	£33.3
Thatcham	£0.0	£0.3	£1.3	£0.0	£0.0	£0.0	£0.0	£1.7
Winchester	£5.1	£0.5	£1.0	£7.0	£49.1	£0.1	£0.3	£63.1
Wokingham	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.5	£1.6
All other shops and stores	£12.4	£2.3	£5.0	£3.9	£14.4	£22.1	£5.1	£65.1
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	**£65.8**	**£36.5**	**£80.1**	**£48.0**	**£120.7**	**£63.6**	**£27.0**	**£441.7**
TOTAL:	**£679.3**	**£165.1**	**£100.9**	**£112.3**	**£184.2**	**£155.0**	**£61.7**	**£1,458.5**

Source: Derived by applying the 'baseline' market share analysis (Table 4) to the available expenditure at the forecast year (Table 3)

TABLE 11: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1-10) (%)

	2015	2017	2022	2027	2029	2031
BASINGSTOKE TOWN CENTRE	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
DISTRICT CENTRES						
Chineham District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brighton Hill District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whitchurch District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tadley District Centre:	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Overton District Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES AND PARADES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE STORES	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%

Source: CJ Estimate based on survey evidence, previous retail studies and judgement as to the likely trade draw of stores and centres from outside the defined study area (based on location, scale, range and quality of offer compared with competing centres/stores).

TABLE 12: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN BOROUGH

		2015	2017	2022	2027	2029	2031
BASINGSTOKE TOWN CENTRE	*£284.4*	£350.92	£374.6	£445.3	£540.6	£590.0	£637.8
CHINEHAM DISTRICT CENTRE	*£31.1*	£31.06	£33.2	£39.5	£48.0	£52.4	£56.7
BRIGHTON HILL DISTRICT CENTRE	*£18.4*	£18.84	£20.1	£24.0	£29.2	£31.9	£34.5
WHITCHURCH DISTRICT CENTRE	*£1.8*	£2.3	£2.4	£2.9	£3.5	£3.8	£4.1
TADLEY DISTRICT CENTRE	*£7.9*	£19.7	£21.0	£25.1	£30.5	£33.3	£36.0
OVERTON DISTRICT CENTRE	*£1.4*	£2.8	£3.0	£3.6	£4.3	£4.7	£5.1
KINGSCLERE LOCAL CENTRE	*£0.0*	£1.5	£1.6	£1.9	£2.3	£2.5	£2.7
OTHER LOCAL SHOPS/PARADES	*£0.9*	£5.3	£5.7	£6.7	£8.2	£8.9	£9.6
ALL BOROUGH CENTRES: SUB-TOTAL	£349.4	**£432.4**	**£461.6**	**£548.9**	**£666.6**	**£727.5**	**£786.5**
OUT OF CENTRE DESTINATIONS:	*£140.6*	£176.3	£188.3	£224.1	£272.3	£297.2	£321.4
BOROUGH AREA TOTAL:	£490.0	**£608.7**	**£649.9**	**£772.9**	**£938.8**	**£1,024.7**	**£1,107.9**

Source: Total turnover estimates derived from market share and trade draw analysis

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TABLE 13: COMPARISON GOODS CAPACITY ASSESSMENT

ASSUME 'EQUILIBRIUM' AT 2015

		2015	2017	2022	2027	2029	2031
STEP 1:	**TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):**	£608.7	£649.9	£772.9	£938.8	£1,024.7	£1,107.9
STEP 2:	**TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):**	£608.7	£635.1	£702.6	£783.4	£818.2	£854.6
STEP 3:	**TOTAL FORECAST RESIDUAL EXPENDITURE (£m):**	£0.0	£14.8	£70.3	£155.5	£206.5	£253.2
STEP 4:	**FORECAST TURNOVER OF COMMITTED FLOORSPACE (£ m):**	£29.8	£33.2	£36.8	£41.0	£42.8	£44.7
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):**	-£29.8	-£18.4	£33.6	£114.5	£163.7	£208.5
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**						
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,000	£5,115	£5,647	£6,297	£6,721	£7,020
	(ii) Net Floorspace Capacity (sq m):	**-5,970**	**-3,602**	**5,944**	**18,179**	**24,354**	**29,702**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-8,528	-5,146	8,492	25,971	34,792	42,431

Step 1: identifies the total 'potential' turnover of all existing comparison goods floorspace at 2015 (based on Table 11). The growth in 'potential' turnover up to 2031 assumes constant market shares over the forecast period.

Step 2: sets out the total 'benchmark' turnover of existing comparison goods floorspace at 2015. Make an allowance for annual floorspace 'productivity' growth of:

2015-2017:	2.7%
2018-2021:	2.0%
2022-2031:	2.2%

Step 3: sets out the forecast residual expenditure capacity available to support new comparison goods floorspace over the forecast period (i.e. the difference between the 'benchmark' and 'potential' turnovers).

Step 4: identifies the forecast comparison goods turnover of all committed floorspace that had planning permission and/or was under construction at the time of preparing this assessment (based on Table 2, Appendix 4). Allow for growth in 'productivity' of all committed floorspace (as above).

Step 5: shows the net residual expenditure available to support new comparison goods floorspace after taking account of all new commitments.

Step 6: forecasts the capacity for new comparison goods floorspace over the forecast period. The forecast residual expenditure capacity (£ million) has been converted to a net retail sales area based on an assumed average sales density for all new comparison goods floorspace of circa £5,000 per m^2 in 2015. This is informed by the average turnover levels achieved by modern retailers trading in town centre locations. Notwithstanding this, it should be noted that the average sales levels for different retailers will vary due to a range of factors, including location and the scale and quality of the different comparison goods sold.

APPENDIX 4: COMMITTED RETAIL FLOORSPACE AND STORE OPENINGS

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TABLE 1: COMMITTED CONVENIENCE GOODS FLOORSPACE

Site Location	LPA Ref	Convenience Net Sales (m^2)	Convenience Sales Density (£ per m^2)	TURNOVER 2015	2017	2022	2027	2029	2031
(1) Budgens - Kingsclere Service Station	BDB/14/00517	210	£5,000	£1.1	£1.0	£1.0	£1.0	£1.0	£1.0
(2) B&M Homestore - Worthing Road	BDB/ 75174	140	£3,730	£0.5	£0.5	£0.5	£0.5	£0.5	£0.5
(3) Co-op - Park Prewett	BDB/63416	677	£7,700	£5.2	£5.2	£5.1	£5.2	£5.2	£5.2
(4) Convenience store - Taylors Farm	BDB/70144	300	£6,000	£1.8	£1.8	£1.8	£1.8	£1.8	£1.8
(5) Convenience store - Merton Rise Neighbourhood Centre	BDB/73174	210	£12,800	£2.7	£2.7	£2.7	£2.7	£2.7	£2.7
(6) Lidl - Gastons Wood, Reading Road	BDB/75973	787	£4,000	£3.1	£3.1	£3.1	£3.1	£3.1	£3.1
(7) Majestic Wines - New Road	BDB/74185	215	£4,210	£0.9	£0.9	£0.9	£0.9	£0.9	£0.9
(8) Waitrose - Basing View	BDB/13/00195	2,385	£12,500	£29.8	£29.6	£29.4	£29.6	£29.6	£29.7
TOTAL		**4,924**		**£45.1**	**£44.9**	**£44.6**	**£44.8**	**£44.9**	**£45.0**

Source: (1) The Budgens store forms part of the Kingclere Service Station. The Council identified the gross floor area as 300m^2. We have assumed the net sales as 70% of gross floorspace. The sales density is based on the company average published in Mintel's Retail Ranking and for similar schemes.

(2) The store has a gross floor area of 2,859m^2 equating to a net sales are of 2,000m^2. A minimum of 90% (1,800m^2 net) of the total net sales are is for the sale of comparison goods with the remainder (200m^2 net) for convenience goods.

(3) The Co-op forms part of a major housing development at Park Prewett and was completed in 2014. The gross floor area of the store is 967m^2, gross; equating to a sales area of 677m^2 (assuming 70% of gross)

(4) Planning permission was granted for new retail floorspace at Taylors Farm including 300m2 gross convenience store (210m2 net sales) and 147m2 gross (103m^2 net sales) for comparison goods floorspace.

(5) Planning permission was granted for a local convenience store, which forms part of a wider housing development at Merton Rise (BDB/73174). The store has a gross floor area of 300m2 with a net sales area of 210m^2 (assuming 70% of gross).

(6) The Lidl store has a gross floor area of 1,458m2 with a net sales area of 1,063m2. Of the total net sales area 80% (798m2 net) is for the sale of convenience goods and the remainder (265m^2 net) for comparison goods.

(7) Planning permission was granted for the development of a retail unit on the former fire station site at New Road in May 2011, which is now occupied by Majestic Wines. The unit has a gross floor area of 307m2 with a net sales area of 215m^2 (assuming 70% of gross).

(8) The Waitrose store has a net sales area of 2,385m^2, all of which is for the sale of convenience goods, as identified in the Retail Statement prepared by CBRE. The sales density is based on the company average published in Mintel's Retail Ranking and for similar schemes.

Notes: Where the applicant has not provided net floor areas it is based on 70% of gross floor area.

Net sales densities are based on information from the corresponding planning application or based average sales density for similar type schemes.

Annual productivitiy growth identified in Tables 4a and 4b, Retail Planner Briefing Note 12.1: Addendum (October 2014) is applied to identify forecast turnover ranging from 2% to 3.8%.

TABLE 2: COMMITTED COMPARISON GOODS FLOORSPACE

Site Location	LPA Ref	Comparison Net Sales (m^2)	Comparison Sales Density (£ per m^2)	TURNOVER 2015	2017	2022	2027	2029	2031
(1) B&M Homestore - 120-122 Worting Road	BDB/ 75174	1,260	£2,100	£2.6	£5.5	£6.0	£6.7	£7.0	£7.3
(2) Bulky goods retail (kitchen/ bathroom showroom) - Stroudley Road	BDB/77396	336	£1,800	£0.6	£0.6	£0.7	£0.8	£0.8	£0.8
(3) Bulky goods (OEG Home Improvements) - 26 Eagle Court, Roentgen Road	13/01184	267	£1,500	£0.4	£0.4	£0.5	£0.5	£0.5	£0.6
(4) Dunelm Mills - Gastons Wood, Reading Road	BDB/75973	2,969	£2,400	£7.1	£6.8	£7.6	£8.4	£8.8	£9.2
(5) Garden centre (Yew Tree Garden Centre) - East Woodhay	BDB/73468	194	£1,100	£0.2	£0.2	£0.2	£0.3	£0.3	£0.3
(6) John Lewis at Home - Basing View	13/00195	4,422	£3,100	£13.7	£14.3	£15.8	£17.6	£18.4	£19.2
(7) Lidl - 557 Reading Road	BDB/75973	585	£2,000	£1.2	£1.2	£1.4	£1.5	£1.6	£1.6
(8) Mixed use development including retail unit(s) - Victoria Street	BDB/74636	280	£5,500	£1.5	£1.6	£1.8	£2.0	£2.1	£2.2
(9) Plant nursery (Avenue Nurseries), Lashem, near Alton	BDB/70812	345	£1,100	£0.4	£0.4	£0.4	£0.5	£0.5	£0.5
(10) Retail units - Merton Rise Neighbourhood Centre	BDB/73174	350	£5,000	£1.8	£1.8	£2.0	£2.3	£2.4	£2.5
(11) Retail unit - Taylors Farm	BDB/70144	103	£3,000	£0.3	£0.3	£0.4	£0.4	£0.4	£0.4
TOTAL		**11,112**		**£29.8**	**£33.2**	**£36.8**	**£41.0**	**£42.8**	**£44.7**

(1) The store has a gross floor area of 2,859m^2 equating to a net sales are of 2,000m^2. A minimum of 90% (1,800m^2 net) of the total net sales are is for the sale of comparison goods with the remainder (200m^2 net) for convenience goods.

(2) Planning permission was granted for a retail unit to accommodate a bulky goods retailer specialising in home improvement products. The unit extendst to 382m^2 gross with net sales estimated at 267m^2 based on 70% of gross.

(3) Planning permission was granted for a retail unit to accommodate a bulky goods retailer specialising in kitchens and bathrooms. The unit extendst to 480m^2 gross with net sales estimated at 336m^2 based on 70% of gross.

(4) The Dunelm Mill store has a gross floor area of 3,712m^2, which includes mezzanine floor (1,674m2 gross). The total net sales area is 2,970m^2. The store offers a range of bulky comparison goods and ancillary non-bulky comparison goods (e.g. decorative items and household textiles). The store has been trading since 2014.

(5) Planning permission was granted for a garden centre at East Woodhay. The scheme is complete and trading as Yew Tree Garden Centre. The site comprises 277m^2 of gross floorspace; equating to 194m^2 net sales. Garden centres achieve relatively low sales densities. Therefore, we have assumed a sales density of £1,100 per m^2 which compares to sales densities identified by Mintel Retail Rankings for garden centre operators.

(6) The Lidl store has a gross floor area of 1,458m^2 with a net sales area of 1,063m^2. Of the total net sales area 80% (798m2 net) is for the sale of convenience goods and the remainder (265m^2 net) for comparison goods. The store has been trading since 2014.

(7) The Lidl store has a gross floor area of 1,458m^2 with a net sales area of 1,063m^2. Of the total net sales area 80% (798m^2 net) is for the sale of convenience goods and the remainder (265m^2 net) for comparison goods.

(8) Planning permission was granted for a mixed use scheme on Victoria Street. The scheme includes a hotel with retail accommodation on the ground floor. We have assumed that the 400m^2 gross of retail space will accommodate a comparison good retailer(s). The net sales area is 280m^2 – assuming 70% of gross.

(9) Planning permission was granted for a plant nursery at Lasham, near Alton. The scheme is complete and trading as Avenue Nurseries. The site comprises 493m^2 of gross floorspace; equating to 345m^2 net sales. Plant nurseries achieve relatively low sales densities. Therefore, we have assumed a sales density of £1,100 per m^2 which compares to sales densities identified by Mintel Retail Rankings for other plant nursery/ garden centre operators.

(10) Planning permission was granted for a local centre, which forms part of a wider housing development at Merton Rise. As well as a convenience store, the local centre includes accommodation for local shops with up to 1,500m^2 gross for A1 to A5 uses. We have assumed that 500m2 is to accommodate a convenience store; 500m^2 for non-food retail and 500m^2 for other town centre uses. As such, the net sales area for non-food retail is estimated at 350m^2 (assuming 70% of gross).

(11) Planning permission was granted for new retail floorspace at Taylors Farm including 300m^2 gross convenience store (210m2 net sales) and 147m2 gross (103m^2 net sales) for comparison goods floorspace.

Notes: Where the applicant has not provided net floor areas it is based on 70% of gross floor area.
Net sales densities are based on information from the corresponding planning application or based average sales density for similar type schemes.
Annual productivitiy growth identified in Tables 4a and 4b, Retail Planner Briefing Note 12.1: Addendum (October 2014) is applied to identify forecast turnover ranging from 2% to 3.8%.