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Lambert Smith Hampton

WINCHESTER DISTRICT RETAIL, LEISURE & TOWN CENTRE USES STUDY

FINAL REPORT

for:

WINCHESTER CITY COUNCIL

August 2020

lsh.co.uk

Prepared by: Bláthnaid Duffy………………………………………………………………

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Signed:

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For and on behalf of Lambert Smith Hampton

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EXECUTIVE SUMMARY

1. Lambert Smith Hampton (LSH) was commissioned by Winchester City Council ('the Council') to prepare this Retail, Leisure and Town Centre Uses Study ('the Study') to help inform both plan-making and development management decisions for the District. Specifically, the study will help inform policy for the emerging Winchester Local Plan on the likely scale, type, location and potential phasing of new development of retail, leisure and other town centre uses over period 2019 to 2036. The emerging Winchester District Local Plan ('the Plan') was originally expected to be adopted at the end of 2021 and to cover the period to 2036. This has been delayed and the end date has been extended to 2038. This Study continues to consider the original Plan period to 2036. This is because of the difficulty in accurately predicting beyond a 5 year period.

2. It is important to note that this Study was commissioned prior to the outbreak of COVID-19 pandemic. Therefore, the baseline information and the future forecasts that have been presented in this Study are based on data that has been gathered prior to the outbreak of the pandemic. Clearly the impact of the pandemic has and will continue to have a number of implications for both the retail and leisure sectors. However, at this stage the full impacts are unknown along with any measures that the Government will put in place in order to respond to these challenges.

3. When considering and assessing the findings of this retail and leisure assessment it is important to understand at the outset that capacity forecasts beyond a five year (short-term) time period should be interpreted with caution as they are subject to increasing margins of error.

RETAIL & LEISURE MARKET TRENDS OVERVIEW

4. As Section 3 highlights, there is a need to move away from high streets as solely retail-led locations to those that offer a wider range of retail, leisure, cultural, heritage, employment, tourist and other amenities/attractions. This transition to more diverse uses that go "beyond retail" will need to be supported by a mix of new homes and apartments on the edge of and/or 'on top of' centres to help boost their 'captive' resident and working catchment populations in the most sustainable and commercially effective way.

5. The retail and commercial leisure markets are expected to be badly impacted from the loss of custom during the period of 'lock down'; the Government's response to managing the COVID-19 pandemic. It is expected that many business that have closed will not reopen once the Government allows the reopening of businesses. This will particularly be the case within the comparison goods retail and food and beverage sectors where many operators were already struggling. How the impact will apply to Winchester District is still unknown, but it is expected that strong centres, such as Winchester Town will maintain demand from retailers and operators owing to its resident catchment and popularity as a visitor destination.

SHOPPING PATTERNS/ RETAIL MARKET SHARES

6. The study was underpinned by a household telephone interview survey of 1,000 households within a defined study area. The Study Area comprised eight zones (see Appendix 1), which mostly cover the Winchester District area, but also part of Eastleigh Borough and Fareham Borough. The survey results informed the assessment of retail market shares (shopping patterns) in Section 4.

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Convenience Goods Shopping Market Shares (including Special Forms of Trading)

7. Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

8. The findings show that under half (41.6%) of all study area convenience expenditure is retained in Winchester District.

9. The District's out of centre foodstores, principally Sainsbury's at Badger Farm and Tesco at Easton Lane, attract the biggest share of expenditure.

10. Weeke Local Centre commands the greatest convenience goods market share of all of the District's centres, which is due to the presence of Waitrose and Aldi, and the centre's relatively easy access to residents in the west of the District.

11. The analysis identified convenience expenditure leakage, which is expenditure generated from the District's population that is spent in locations outside of the District. Foodstores in Eastleigh, Fareham and Hedge End Retail Park account for a high proportion of convenience expenditure leakage from the District. These competing locations fall within the study area and there is expected to be some overlap with their catchments and nearby centres located within the District.

12. Special Forms of Trading (SFT), which largely represents online shopping accounts for 7.5% of total study area convenience expenditure, which is lower than the UK average (14%[1]).

Comparison Goods Shopping Market Shares (including SFT)

13. Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods.

14. The results confirm that Winchester District retains 23.8% of the comparison goods Study Area expenditure. Town, district and smaller centres in the District collectively attract 18.3% of total comparison goods study area expenditure, which is largely supported by Winchester Town, with 12% of the total expenditure.

15. Winchester's other district, local, and smaller centres account for a much lower proportion of non-food expenditure which reflects the more limited non-food offer compared to higher order centres within the Study Area (i.e. Winchester Town, Fareham Town Centre, and Eastleigh Town Centre), and beyond.

16. Whilst, Whiteley Town Centre provides the type of offer that appeal to a wide catchment, the market share analysis shows that it mostly supports expenditure from immediately surrounding zones.

17. Out of centre comparison goods retailers have a limited market share which reflects the limited out of centre offer available, and the lower expenditure value of that offer.

18. Southampton City and its surrounding out of centre retail destinations (including Hedge End) stand out as the main competing destination for comparison goods sales, together accounting for almost a fifth (23.9%) of all study area comparison goods expenditure.

19. SFT/Online sales account for over a quarter (26.3%) of total comparison goods expenditure in the study area, which we consider high and is above the UK average (23.4%[1]).

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[1] Not adjusted for online goods sourced from physical stores. UK average identified by Experian Business Strategies Retail Planner Briefing Note 17 (February 2020).

POPULATION & EXPENDITURE

20. Population and expenditure forecasts are set out in Section 7. The population projections for the study area and zones take account of the impact of local housing land supply on population growth within the study area. Population projections for the areas within study zones that sit within Winchester District were informed by housing supply identified from the Council's 'Future Local Housing Need Assessment and Strategic Housing and Market Assessment (SHMA).

21. The total study area population is projected to increase from 221,201 in 2019 to 253,930 by 2036. This represents an increase of +32,729 people or +12.9% from the population in 2019. For the Winchester District area only, the projected population is expected to increase from 127,932 in 2019 to 148,566 in 2036 (+20,634/ +13.9%).

22. The Council's population projections for Winchester District are greater than those identified by Experian who derive their projections from the Office of National Statistics (ONS). Experian forecast the District's population to increase to 143,085 (+13,752 people/ 10.6%).

23. Total convenience goods expenditure in the study area is forecast to increase by +12.2% (+£62.1m); from £522.7m in 2019 to £573m by 2029 (2017 prices), increasing to £589.9m (+£79m/ +15.5% from 2019) based on the longer term to 2036.

24. Total comparison goods expenditure growth is forecast to be higher over the ten year period to 2029, at +39.2% (+£331m); from £843.4m to £1,174.3m. Similarly, growth is higher in the longer term to 2036, increasing to £1,444.5m (+£601.2m / +71.3%).

RETAIL CAPACITY ASSESSMENT

25. The quantitative retail need ('capacity') assessment in Section 7 identified the potential to support new retail (comparison and convenience goods) floorspace in Winchester District over the period from 2019 to 2036. The NPPF requires that local authorities appropriately plan to meet retail need for a maximum period of ten years. The PPG recommends that forecasts are re-assessed every five years. Therefore, this assessment places emphasis on the forecasts identified between 2019 and 2029.

26. After allowing for committed convenience floorspace there is limited capacity over the short term (up to 2024) to support new convenience floorspace in the District. By 2029 capacity emerges to support 853 sqm net sales of new convenience floorspace.

27. 26. After allowing for committed comparison floorspace there is capacity to support up to 2,961 sqm of net sales comparison goods floorspace in Winchester District by 2029, with forecast capacity falling to 1,852 sqm net sales in the longer term to 2036. The decline in comparison goods retail need beyond 2029 is linked to a fall in housing supply sites, as housing sites are expected to be delivered in the short to medium term.

28. The convenience and comparison capacity forecasts were also tested against the study area population derived from Experian/ ONS. The results of the capacity assessment found no capacity to support new convenience floorspace in the District, with more limited potential to support comparison goods floorspace than that identified using the Council's housing supply population projections.

COMMERICAL LEISURE NEED

29. The commercial leisure industry faces considerable challenges and pressures, which is discussed in Section 8. It is clear that consumers are becoming increasingly selective in terms of where and how they spend on discretionary leisure. There will also be a continued increase in at-home activities,

particularly screen based entertainment, due to the advances in computers, tablets, television, gaming, and audio technology and the impacts of COVID-19. Similarly, home delivery for prepared meals is becoming ever more sophisticated and convenient, and is expected to increase its share of the dining out market. Therefore, the challenge for town centres and leisure operators in the future will be to attract customers away from their homes.

30. Our review of Winchester District's commercial leisure sector and offer, and the results of the household survey, indicates generally high levels of satisfaction with the leisure offer. The dining out market is particularly strong for Winchester Town, but there is potential to improve the District's wider leisure offer. The provision of a new mainstream multiplex cinema is a potential area for investment, which would help claw back customers from the District that are currently traveling to major cinema venues in Eastleigh, Southampton, and Basingstoke.

31. Whilst the District's theatres, music venues and historical attractions are popular with study area residents, Winchester continues to compete with attractions in central London and with Southampton in respect to theatre. There may be potential to expand on theatre offer in the District in terms of new venues. Alternatively, improvements could be made to existing facilities through better marketing of venues and an improved events programme. .

32. An assessment of forecast expenditure spend on dining out shows that there will be a significant increase in expenditure within the study area. Winchester Town remains a popular destination for those living in the study area and there is likely to be continued demand from residents and visitors, as well as food and beverage operators for new cafes and restaurants in the city centre. We understand that concerns have been raised by some residents in Bishop's Waltham and New Alresford that there are already too many coffee shops/ cafes. However, this particular sector is helping to maintain footfall to town centres as the role of retail shrinks.

33. The popularity of healthier lifestyles is driving growth in the health and fitness market. From a quantitative assessment there will be sufficient growth in Winchester District's forecast population to 2029 to support one to two new mainstream gym operators. Whilst some demand will be met by the provision of improved gym facilities in Winchester Sports and Leisure Park scheme there may be demand from the market to support a local or independent niche operator require a smaller membership to establish a viable business and which appeals to a younger demographic.

34. Additionally, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to town centres first.

POLICY RECOMMENDATIONS

35. Policy recommendations for managing town centre development are set out in Section 9. No changes are recommended to the town centre boundaries of any of the District's assessed town centres. A Primary Shopping Area (PSA) designation is only identified for Winchester Town Centre, which covers Primary and Secondary Shopping Frontages. We have recommended that the PSA for Winchester Town is defined to include the entire site that relates to the frontage and that this is clearly indicated on a Policy Map. For the District's other centres including Whiteley, Bishop's Waltham, New Alresford, and Wickham, the PSFs that are currently identified effectively serve as the PSA for these centre. As for Winchester Town, we consider that the PSA the centres should be defined so that it provides policy protection to the entirety of the property associated with the relevant PSF. We do not consider that the identification of SSFs is required for the District's other centres given the size of these centres and the fact that the PSF will provide sufficient protection to support the centres' retail function.

36. It is advised that any proposal for edge and out of centre town centre uses, particularly for retail floorspace, are required to demonstrate impact where the proposal is above the recommended threshold of 350 sqm gross. This will ensure that proposals for smaller stores and applications to incrementally expand existing edge and out of centre retail offer are appropriately assessed in terms of their potential impact on existing centres.

37. The District's centres are on the whole fulfilling their respective roles in the hierarchy. We do not consider that any changes are required to the current hierarchy, with the exception of allowing for the allocation of new local centres that will form part of emerging housing allocations (e.g. Barton Farm and North Whiteley).

FUTURE TOWN CENTRE STRATEGIES

38. The following summarises the findings of the health check assessments (Sections 5 and 6), localised capacity for new retail floorspace (Section 7), and advice on where investment should be directed for Winchester's town and district centres (Section 12).

Winchester Town Centre

39. Winchester Town is a unique and thriving centre that boasts a good range of quality high street and independent retailers, but also a very strong offer in food and beverage and other commercial leisure uses. The town centre's retail pitch is aimed at mid-market customers and above, reflecting a relatively affluent resident catchment

40. There are concerns that food and beverage (F&B) provision has reached saturation levels for the town centre, but evidence from published operator requirements indicates that Winchester is still considered a key area for F&B investment. This is likely to be driven by catchment demographics (i.e. an affluent population with greater disposable income) and the centre's attraction as a visitor destination.

41. Vacancies are low in the town centre and are mostly located in secondary streets. The centre's shop unit vacancy rate in 2018 (7.9%) sits well below the national average for that year (11.7%). There is concern that some town centre business will not reopen post the COVID-19 lockdown and there is a possibility that the Debenhams store will close in light of the retailer entering into administration (early 2020).

42. The household and in-centre survey revealed that respondents particularly like the centre's attractive environment, history and traditional character. The centre's good food and beverage offer (e.g. cafes and restaurants) was highlighted as a key feature for the town centre by survey respondents, generating more response than for the centre's retail offer. This highlights the important role of this particular leisure activity in supporting day and evening time trade. In terms of suggested improvements to the town centre, respondents to the household and in centre surveys were would like to see more national multiples/ high street stores as well as more independents and better convenience/food offer.

43. The assessment identifies capacity to support up to 853 sqm of new convenience floorspace for the District by 2029, reducing to 634 sqm net sales by the end of the study period (2036). There is limited capacity to support new convenience goods floorspace for Winchester Town, with forecast capacity higher for Weeke Local Centre (237 sqm net sales by 2029) and Bishop's Waltham District Centre (220 sqm net sales). For comparison goods retail, the assessment forecasts capacity for up to 2,961 sqm net sales of new comparison good retail floorspace by 2029, the major of which is identified in Winchester Town. This District-wide capacity reduces to 2,435 sqm net if current vacant floorspace in Winchester Town's prime retail pitch is re-occupied. In the longer term to 2036, District-

wide forecast need for comparison goods floorspace falls to 1,852 sqm net sales or 1,326 sqm net sales if the aforementioned vacant prime retail floorspace is re-occupied.

44. Overall forecast retail floorspace capacity could be accommodated within the Central Winchester Regeneration area (CWR).

45. The CWR area represents the most important investment opportunity for the town centre and will be critical in promoting Winchester as a place to invest in and the potential to offer something different for residents and visitors. The Brooks Shopping Centre also presents a longer term opportunity to redevelop the centre to provide more modern and larger floorplates while in the interim, the potential to diversify commercial uses could help to reoccupy vacant units.

46. A strategy for Winchester Town Centre should seek to protect the town's unique heritage setting, which will serve as a key draw for visitors and town centre operators. At the same time, it is vital that the Council look to the future and ensuring the town centre can respond to changes in retail and leisure trends, including increasing demand from customers for experience-led offer, increasing competition from online shopping, and the draw of competing centres.

47. They key themes the strategy should focus on are:

- Diversification and flexibility of the town centre uses to allow businesses to respond to changing trends and market conditions;
- Priority in delivering the CWR area;
- Increasing residential living, including utilising vacant upper floors; and
- Enhancing digital infrastructure in the town centre and online retail training for independent businesses.

48. A short term strategy for the town centre will need to address the likely impact from COVID-19. The temporary closures of shops and leisure outlets as a result of the Government's imposed 'lockdown' could lead to further vacancies in the town centre as businesses collapse from the loss of trade. There will be a greater urgency in the need to diversify town centre offer and promote flexibility uses in particular.

Whiteley

49. Whiteley is a purpose-built, modern development and is very different in character and purpose than all the other centres in Winchester. The centre is well maintained and provides a pleasant environment for shoppers.

50. The town centre offer is primarily retail and leisure orientated and all but one of the A1 retail units are occupied by national multiples.

51. Only one vacant unit was recorded in the PSA, but the unit has since been re-occupied by Seasalt. There appears to be on-going demand for retail space in the centre.

52. Respondents to the household survey highlighted the centre's accessibility including proximity to home and good parking access as the most positive aspects of the centre as a place to visit. This was followed by the centre's good range of high street retailers and places to eat out. The majority of respondents were happy with what the centre offers, but where improvements were suggested they mainly centred on reducing traffic and better road access to/from the centre, followed by the provision of covered shopping areas.

53. There is limited capacity to support new retail floorspace in Whiteley, with 62 sqm and 181 sqm of additional comparison goods retail floorspace (net sales) is identified for Whiteley. However, given the quality and range of existing retail brands and leisure offer at Whiteley, opportunities to expand the centre will be influenced by market demand rather than capacity forecasts. The centre benefits

from good connections to the road network and will be an attractive location to new retail and leisure operators. In addition, the centre is likely to benefit from increased footfall from the emerging population at North Whiteley, which could increase its market share in the future. This in turn could increase forecast need for new retail floorspace.

54. It will be important for the centre to broaden its offer to support a wider mix of town centre uses, particularly if it is to support the new community at North Whiteley. This should be the main goal of a strategy going forward for the centre, which will require ‘buy-in’ from the centre owners and without compromising the commercial viability of the centre.

Bishop’s Waltham

55. Bishop’s Waltham’s retail and town centre offer is largely supported by independent retailers and businesses trading from smaller units within historic buildings.

56. The centre has a particularly strong service offer with both retail services and financial and business services well-represented compared with the UK average. The vacancy rate is well below the national average.

57. The retail capacity forecasts indicates a need for 220 sqm net and 208 sqm net of convenience and comparison floorspace, respectively, by 2029. The forecasts, albeit small in quantum terms, are higher than for other District Centres and reflect higher projections in population growth linked to housing supply allocations in the area.

58. A strategy for the town centre should focus on supporting existing town centre uses rather than seek to expand physical floorspace. Smaller centres, such as Bishop’s Waltham will be more vulnerable to further changes in the retail and leisure market. Therefore, policy should consider the potential to allow greater flexibility for town centre uses, but without compromising the retail function of the Primary Shopping Area. Options to improve parking capacity in the town centre should be explored.

New Alresford

59. The town centre is an attractive market town that is popular with visitors. The centre provides a good mix of retail and town centre uses for its local catchment, despite the relative proximity of Winchester. Unlike Winchester’s other district centres, New Alresford has a very high proportion of A1 comparison outlets.

60. Six vacant units were recorded in the centre, one of which was in the primary shopping area. Of the remaining five units in the rest of the town centre, two were in the process of being re-occupied.

61. The centre’s attractiveness is considered the most positive feature by respondents to the household survey, followed by the centre’s good range of independent shops. The main improvements respondents would like to see relate to parking provision (more/ better parking and free parking) and the need for more independent shops.

62. There is very limited capacity to support new retail development in the town centre. However, opportunities to improve the town centre’s convenience offer should be encouraged, such as an extension to the existing foodstore or the development of a new foodstore within the district centre. This could claw back expenditure currently lost to Winchester’s out of centre foodstores and foodstores in Alton.

Wickham

63. The smallest of Winchester’s district centres, Wickham retail offer serves a much localised catchment and largely supports day to day shopping needs. The centre has a notable number of small antiques and gifts outlets which add to the overall attractiveness for visitors and appear to offer business opportunities for local residents.

64. There is limited capacity to support new comparison good floorspace. However, there may be potential to build on the centre's niche retail offer, which would distinguish Wickham from other centres in the District and is likely to help draw visitors to the centre.

65. The development of the Welborne Garden Village just two miles south of Wickham has the potential to increase footfall in the centre or draw trade to new facilities in the planned district centre. A strategy for the town centre should explore how current levels of trade can be protected or enhanced, which along with the promotion of the centre's niche retail offer could also run alongside the potential to promote seasonal events such as farmer markets, antique markets, etc.

Local Centres

66. The District has five local centres including Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/Andover Road, and Weeke. With the exception of Weeke, the local centres principally serve the day to day convenience retail needs of their immediate communities.

67. Weeke Local Centre has two foodstores, Waitrose and Aldi, which means that the centre draws a much wider shopping catchment compared to the other local centres and most of Winchester's district centres. The capacity assessment identifies up to 334 sqm net of new convenience goods retail floorspace for Weeke by 2029.

68. For the District's remaining four local centres and smaller centres/villages, the assessment identified capacity for up to 237 sqm net sales convenience floorspace and up to 94 sqm net sales of comparison goods floorspace by 2029. This forecast need will be met by evolving changes to existing retail offer in these centres, Opportunities to support new retail offer should be directed within existing local centres or where it serves a specific local community need, and subject to other development management policies on the sequential and impact tests.

Rest of District/ Out of Centre

69. Retail offer in the rest of the District's mainly relates to out of centre facilities such as major foodstores at Badger Farm Road (Sainsbury's) and Easton Lane (Tesco), and bulky goods comparison retailers in the Easton Lane/ Winnall area.

70. Where forecast need is identified for the rest of District, this is generated from expenditure drawn to out of centre retail offer (e.g. Easton Lane/ Winnall area). This need should not justify the development of further out of centre retail floorspace and should be instead directed to the District's existing or planned town, district and local centres.

MARKET CHALLENGES AND COVID-19

71. The retail and leisure industries are dynamic and evolving sectors, but they are facing significant challenges and pressures from changes in the economy, policy and consumer trends. It is clear, for example, that consumers are becoming increasingly selective in terms of where and how they spend their disposable income on retail goods and discretionary leisure. The growth in online shopping and "at-home" entertainment and activities, represents a further challenge for town centres and retail and leisure operators to attract customers.

72. It is too early to predict the form and scale of impact from the COVID-19 pandemic, but it is likely that it will hasten the demise of town centre businesses that were already struggling. There is now even greater onus on promoting the diversification town centres and allowing greater flexibility of uses. This could help centres to respond quickly to major economic impacts, but also evolving customer and market trends.

1. INTRODUCTION

1.1 Lambert Smith Hampton (LSH) was commissioned by Winchester City Council ('the Council') to prepare this Retail, Leisure and Town Centre Uses Study to help inform both plan-making and development management decisions for the District.

1.2 It should be stated at the outset of this study that it has been prepared during the outbreak of the coronavirus (COVID-19) pandemic in the UK and across the world. The Government's containment response resulted in the 'lockdown' of social activity and the closure of non-essential town centre businesses. This was having an unprecedented impact on the way the nation lives, shops, works and carries out a range of activities at the time. The impact on politics, policy, the economy and businesses, including the UK's town centres and high streets, was changing on a day-to-day basis during the peak of the pandemic. The full impacts on the UK's economy, business/investor confidence, commercial property and our town centres will not be realised until after the pandemic has passed and the country returns to more "normal conditions". Against this background we advise the Council that it may need to review and refresh this study at an appropriate time within the next two years to better understand the impacts on the District's economy, its town centres and household shopping and leisure patterns.

1.3 Notwithstanding the caveat with regard to the impact of the coronavirus impact, this study does provide the robust evidence base and key findings to help to inform and guide both plan-making and decision-taking across Winchester District and its main centres up to 2036

1.4 The Study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF), updated in June 2019. Where relevant the study also draws on advice set out in the National Planning Practice Guidance (PPG), updated in October 2019, which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. The sequential and impact 'tests' are also critical to both plan-making and decision-taking at local level.

1.5 Specifically, the study will assess the need (or 'capacity') for new retail (convenience and comparison goods) floorspace at strategic (District-wide) and town centre level; and help inform the likely scale, type, location and potential phasing of new retail, leisure and tourism development over the short (0-5 years i.e. 2024), medium (6-10 years i.e. 2029) and long term (11-17 years i.e. 2034). The study will also identify any gaps in commercial leisure provision based on quantitative analysis (where measurable) and likely market demand over the ten year period to 2029.

1.6 A study/catchment area has been defined for the purpose of this study, which principally covers the Winchester District area. The study area extends to include parts of neighbouring Eastleigh Borough and Fareham Borough to reflect broader shopping and leisure patterns and influence that principal centres in these authorities will have on shopping patterns in Winchester. (Appendix A1). The study area has been divided into eight zones that broadly reflect the population distribution and local catchments for centres within. The defined study area and zones provide the framework for the new telephone interview survey of some 1,000 households conducted by NEMS Market Research (NEMS).

1.7 The survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the study area. The survey findings have also informed the health check assessments for the main study centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace and leisure uses over the plan period.

1.8 For ease of reference this report is structured as follows:

- **Section 2** reviews the national and local planning policy context material to retail planning and town centres.
- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4** sets out the results of the market share analysis for convenience and comparison goods shopping and leisure use across the study area based on the household telephone interview survey (HTIS). The more detailed market share tabulations for convenience and comparison goods (including Special Forms of Trading) are provided in Appendix A4 and A5 respectively, and the results of HTIS in Appendix B.
- **Sections 5 & 6** detail the findings of the health checks for Winchester Town Centre; Whiteley Town Centre, and the three district centres of New Alresford, Bishop's Waltham, and Wickham. This section also considers the findings of an in-centre survey for Winchester Town Centre; the results of which are contained in Appendix C.
- **Section 7** sets out the key assumptions and outputs of LSH's in-house **CREAT**^{e} economic capacity model. This includes the forecast population and expenditure available in the Study Area (Appendix A3); the convenience (Appendix A6) and comparison (Appendix A7) turnovers of all existing centres/stores; and the forecast trading characteristics of all known committed retail floorspace at the time of preparing this assessment. It also presents the detailed District-wide and centre capacity forecasts for both convenience (Appendix A8) and comparison goods (Appendix A9).
- **Section 8** sets out the findings of the commercial leisure 'gap' assessment. This looks at the main commercial leisure uses, and provides a high level review of the need for new food and beverage uses, cinema and gyms based on the health checks, household and in-centre survey evidence (Appendices B and C). An assessment of leisure expenditure is provided in Appendix A10.
- **Section 9** provides policy recommendations in respect the threshold for assessing impact of proposed town centre uses that are edge and out of centre, defined boundaries for the town centre, the primary shopping area and retail frontages, and District's centre hierarchy,
- **Section 10** draws on the previous sections of the Study. It summaries the relative health, role and function of the Council's main centres and where policy and investment should be direct to sustain their vitality and viability.

1.9 When considering and assessing the findings of this retail and leisure assessment it is important to understand at the outset that capacity forecasts beyond a five year (short-term) time period should be interpreted with caution as they are subject to increasing margins of error. We therefore advise that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be updated regularly to take into account any significant new retail development at the local level; changes in the retail expenditure and population growth forecasts over time; as well as any potential impacts arising from other key trends in the retail and leisure sectors (such as, the growth in internet shopping) and commercial leisure sectors. For example, a significant growth in the market share of on-line internet shopping above current forecasts will substantially reduce the capacity for new 'physical' retail floorspace over the plan period, as well as the market demand from retailers for representation in town centres. Recommendations will be provided on the next steps to addressing forecast need and meeting market demand, and how future need should be monitored.

2. PLANNING POLICY OVERVIEW

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other material considerations.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF) (2019)

2.2 The revised NPPF was published in June 2019 and supersedes guidance in the February 2019 update and original 2012 Framework. The NPPF guides planning policies for England and how these are expected to be applied. The NPPF must be taken into account in the preparation of Local Plans and Neighbourhood Plans. Much of the most recent changes to the original 2012 NPPF were incorporated in the 2019 NPPF particularly in terms of reinforcing the importance of up-to-date plans and strengthens local decision making. The presumption in favour of sustainable development remains a key objective for both plan-making and decision-taking (paragraph 10) which has followed through the 2019 iterations of the NPPF and is set out in ***Chapter 2 'Achieving Sustainable Development'***.

2.3 Paragraph 11 of the NPPF sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level. For plan-making the Framework states that "plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change" (paragraph 11a). Local Plans should meet objectively assessed needs, as well as any needs that cannot be met within neighbouring areas, unless:

- there are polices in the Framework that protect areas or assets, thereby requiring a restriction in overall scale, type or distribution of development in a plan area;
- or any adverse impacts of doing so would significantly and demonstrably outweigh the benefits.

2.4 For decision taking the Framework places the onus on local authorities to approve development proposals without delay where they accord with an up-to-date development plan. Where development plan policy is silent or policies are out-of-date, permission should be granted unless there is a clear reason for refusal where policies in the Framework that protect areas or assets of particular importance apply, or any adverse impact of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in the Framework taken as a whole.

2.5 ***Chapter 3 'Plan-Making'*** of the Framework provides guidance to local authorities on preparing local plans. Turning to guidance on strategic policies, paragraph 20 states that strategic policies should set out an overall strategy for the pattern, scale and quality of development. To achieve this they should make sufficient provision for: housing, employment, retail, leisure and other commercial development; and the provision of infrastructure, and community facilities. Local Plans should plan positively for the development and infrastructure required over a minimum 15 year period (except in relation to town centre development). Consideration should also be given to protecting and enhancing natural, built and historic environment, including landscapes and green infrastructure, as well as measures to address climate change. Local authorities are expected to plan for and allocate sufficient sites to meet needs over the plan period (paragraph 23). The revised Framework requires a shorter ten year time horizon for allocating sites to meet the forecast needs for new retail, leisure, office and other main town centre uses.

2.6 The Framework promotes the importance of the 'duty to co-operate' with neighbouring authorities on strategic matters that cross administrative boundaries (paragraph 24 and 25). Local authorities will be required to demonstrate effective co-operation on cross-boundary issues by way of statements of common ground.

2.7 Finally in preparing development plans, paragraph 31 of the Framework states that "policies should be underpinned by relevant and up-to-date evidence." To ensure the local plans and spatial strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 33).

2.8 ***Chapter 7 'Ensuring the vitality of town centres'*** provides guidance on plan-making and decision-taking for retail and other town centre uses. Paragraph 85 sets out criteria that Local Planning Authorities should consider when preparing planning policies. These include:

- Defining a network and hierarchy of town centres.
- Defining town centre boundaries and Primary Shopping Areas.
- Retaining and enhancing existing markets and the potential to create new markets.
- Meeting anticipated needs for town centre uses over a 10 year period by way of identifying suitable town centre sites.
- Where suitable town centre sites are not available, identifying suitable edge of centre or other locations subject to their connectivity and accessibility to the town centre.
- Promoting residential living in town centres.

2.9 Paragraphs 86-90 specifically set out the revised policy wording with regard to the sequential and impact tests for retail, leisure and main town centres that are neither in an existing centre, nor in accordance with an up-to-date development plan.

2.10 When assessing and determining applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a sequential test , which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available within a reasonable period (paragraph 86)
- When considering edge and out of centre proposals, *'…preference should be given to accessible sites that are well connected to the town centre'* (paragraph 87). Applicants and LPAs should demonstrate flexibility on issues such as format and scale. (paragraph 88).
- Require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). This should include assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment area.

2.11 The NPPF (paragraph 90) states that '…where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused'.

NATIONAL PLANNING PRACTICE GUIDANCE (PPG) (2019)

2.12 This study also draws on advice set out in the Planning Practice Guidance (PPG) on 'Town Centres and Retail', which was updated in October 2019. The PPG has streamlined and replaced the advice previously set out in the PPS4 Practice Guidance on Need, Impact and the Sequential Approach. The revised PPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and thus retains the key sequential and 'impact tests'. Of relevance to this study the PPG (para 004) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a five year period to take account of uncertainties in forecasting long-term retail trends, but should 'also take the lifetime of the Local Plan into account and be regularly reviewed'.

2.13 The PPG provides advice to local authorities on the preparation of development plans and town centre strategies.

2.14 In terms of what a town centre strategy should contain, the PPG advises that local authorities consider (004 Reference ID: 2b-004-20190722):

- the realistic role, function and hierarchy of town centres over the plan period;
- the vision for the future of each town centre, including the most appropriate mix of uses;
- the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space:
- how existing land can be used more effectively;
- opportunities for improvements to the accessibility and wider quality of town centre locations;
- what complementary strategies are necessary or appropriate to enhance the town centre;
- the role that different stakeholders can play in delivering the vision:
- appropriate policies to address environmental issues facing town centres.

2.15 Regarding "what if future development needs cannot be accommodated in the town centre"; planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the identified need for these main town centre uses, having regard to the sequential and impact tests (Paragraph: 005 Reference ID: 2b-005-20190722). In applying the sequential test for plan making local authorities are expected to consider the following checklist (Paragraph: 010 Reference ID: 2b-010-20190722):

- has the need for main town centre uses been assessed?
- can the identified need for main town centre uses be accommodated on town centre sites?
- If the additional main town centre uses required cannot be accommodated on town centre sites, what are the next sequentially preferable sites that they can be accommodated on?

2.16 The recent update to the PPG revises guidance on town centres. The most notable revisions relate to the recommended Key Performance Indicators for assessing the 'health' of town centres. In addition to the KPIs identified in the 2014 PPG, the 2019 update includes a number of additional KPIs for consideration including: how accessibility for people with mobility impairments or health conditions are catered for, understanding the balance between independent and multiple stores; evidence of barriers to new businesses opening or existing businesses expanding; and reviewing opening hours and the extent to which an evening and night time economy is supported.

2.17 Guidance is also provided on planning permission for permitted development and change of use in town centre uses, and where it may be appropriate to use permitted development rights to support flexibility in town centres.

LOCAL PLANNING CONTEXT

2.18 The extant development plan policies, guidance and evidence base documents that are particularly relevant to town centres and retail planning for Winchester District consist of the following documents:

- Winchester District Local Plan Part 1 Joint Core Strategy (2013);
- Winchester Local Plan Part 2 (2017); and
- Central Winchester Regeneration Supplementary Planning Document (2018)

2.19 We briefly review these documents below.

Winchester City Local Plan Part 1: Joint Core Strategy (Adopted 2013)

2.20 The Winchester Local Plan Part 1: sets out the Councils planning strategy for Winchester District (including the South Downs National Park Authority that lies within the District) over the period from 2011 to 2031. It identifies key proposals, allocates land for development and sets out detailed policies which the Council will use to determine planning applications.

2.21 The Local Plan states that it will;

- Set out a spatial vision for the District, showing how it will change in the future in physical, economic, social and environmental terms;
- Identify the amount of development and broad locations for change, growth and protection, including allocating strategic sites; and
- Set out an implementation and monitoring framework, together with a delivery plan to demonstrate how the infrastructure requirements necessary for the development strategy will be achieved.

2.22 The Local Plan Part 1 identifies the urban areas of Winchester Town and South Hampshire as the principal focus for new development.

2.23 Policy DS1 (Development Strategy and Principles) provides strategic development guidance on where development that supports housing and economic growth should be directed across Winchester District. New housing and economic will be directed to:

- Winchester Town – approximately 4,000 new homes and development that supports the local economy, particularly within the higher education, creative and media industries, and knowledge-based industries, whilst protecting the fabric of the centre’s heritage assets.
- The South Hampshire Urban Areas – provide for two new neighbourhoods that will support 6,000 new homes and contribute to meeting the PUSH strategy targets for housing, economic growth and community, and infrastructure.
- The Market Towns and Rural Area – provide approximately 2,500 new homes and promote economic growth and community development, whilst protecting the rural character and settlement identity of these smaller centres.

2.24 Policy DS1 also informs the centre hierarchy for Winchester District which guides the town centre first approach to new development for retail, leisure and other town centres. The centre hierarchy for Winchester is summarised in the table below.

Table 2.2: Local Plan (Policy DS1) Hierarchy of Centres

Sub-regional Centre:	Winchester
Town Centre:	Whiteley
District Centres:	Bishop's Waltham, New Alresford, and Wickham
Local Centres:	Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/ Andover Road, and Weeke

2.25 As the table shows, Winchester Town is identified as a sub-regional centre and is followed in the hierarchy by Whiteley. Whilst, Whiteley is a designated 'town centre', as a purpose built shopping centre, the centre serves a broader catchment than what would typically expected for a town centre. Winchester has three district centres, which sit below Whiteley in the centre hierarchy, including Bishop's Waltham, New Alresford, and Wickham. The centres serve as important local retail and service centres for their surrounding residential population. The District's population is also supported by five Local Centres, three of which sit within the defined settlement boundary of Winchester (i.e. Oliver's Battery, Stockbridge Road/ Andover Road and Weeke).

2.26 **Policy WT1 (Development Strategy for Winchester Town)** confirms that the spatial planning vision for Winchester Town will be achieved through;

- Provision of about 4000 new homes (2011-2031) to meet a range of community needs and deliver a wide choice of homes including affordable homes to ensure social inclusion. This will be achieved through:
  - Development and redevelopment of existing premises and sites and other opportunities within and adjoining the defined built-up area of Winchester, to deliver some 2000 new homes;
  - A new neighbourhood to the north of Winchester at Barton Farm for about 2,000 homes (of which 40% should be expected to be affordable);
- Provision of additional retail floorspace through existing planned developments at Silver Hill in the short to medium term and future additional provision of about 9,000 sqm. to 2031 to support Winchester's role as a sub-regional shopping centre for existing and new communities; and
- Promotion of the town centre as the preferred location for new development that attracts high visitor numbers such as retail, commercial and offices, leisure, culture and tourism. Proposals for new floorspace of 1,000 sqm or more outside the defined town centre will need to demonstrate that it would not have a harmful impact on the town centre.

2.27 **Policy CP1 (Housing Provision)** states that provision will be made within the District for the provision of about 12,500 dwellings (net) in the period April 2011 to March 2031, distributed between the three spatial areas as follows:

- Winchester Town: 4000 dwellings;
- South Hampshire Urban Areas: 6,000 dwellings; and
- Market Towns and Rural Area: 2,500 dwellings.

2.28 Approximately 8,000 of this total will be within major developments at North Winchester (2,000), West of Waterlooville (2,500) and North Whiteley (3,500).

Winchester District Local Plan Part 2 (2017)

2.29 The Winchester District Local Plan Part 2 forms part of the District Development Framework and will guide future planning decisions in Winchester District. The document provides the detailed development management policies and allocates the sites to meet the need identified in the Local Plan Part 1 (adopted in 2013).

2.30 The following policies provide guidance on how and where new town centre uses should be managed and developed across the District.

2.31 **Policy WIN I (Winchester Town)** confirms that planning permission will only be granted within the defined settlement boundary of Winchester providing it accords with the Development Plan and is consistent with the following principles:

- Protect and enhance the special character of Winchester Town, including its setting, heritage assets and treed skylines;
- Provide a range of housing (including affordable housing);
- Encourage economic prosperity by reinforcing its reputation as a regional centre for creativity and culture.

2.32 **Policy WIN 2 (Town Centre)** confirms that within the town centre planning permission will be granted for development which accords with the Development Plan and is consistent with the following principles:

- Contribute towards maintaining Winchester's role within the hierarchy of retail centres and promote the town centre as a natural destination for visitors and shoppers;
- Contribute towards economic prosperity, and broaden the Town's economic base, through retention/expansion of existing business and provision of space for new and start-up businesses;
- Effectively mitigate adverse environmental or transport impacts within the town centre; and
- Enhance the sensitive historic environment of the town centre and its heritage assets.

2.33 **Policy WIN4 (Silver Hill Mixed Use Site)** confirms that development proposals for mixed use developments (within the Silver Hill Area) will be granted permission providing it accords with the development plan and demonstrates that the following principles will be met:

- Provision of an appropriate mix of uses that reinforce and complement the town centre (including retail, residential, community/civic uses, and other town centre uses);
- Respect the historic context and make a positive contribution towards protecting and enhancing and local character and special heritage of the area and important historic views, especially those from St Giles Hill;
- Include proposals which accommodate buses and coaches, improve conditions in the Broadway, and remove traffic from Silver Hill; and
- Include a Strategic Flood Risk Assessment, with suitable mitigation measures.

2.34 **Policy DM33 (Shop fronts)** confirms that proposals which alter or replace existing shop fronts (that currently contribute to the character of the building or area), will only be permitted if they continue to preserve or enhance the character of the area and are designed to relate closely to the overall character of the building in terms of scale and style. New shop fronts in Conservation Areas should normally incorporate traditional design elements and materials.

2.35 Specific development management policy on the development of town centre uses within and outside the District's centres is set out in Section 6 (Development Management) of the LPP2.

2.36 **Policy DM7 (Town, District and Local Centres)** sets out that town centre uses which attract large numbers of people should be located within the boundaries of the town, district and local centres. This will primarily consist of Use Classes A1-A5, B1, C1, D1, and D2 but may also include arts, cultural, tourism, entertainment uses or other sui generis uses, where appropriate. The policy states that changes of use that result in a net loss of town centre uses (Use Classes A1-A5, B1, C1, D1, D2 and other uses considered as town centre uses) at ground floor level will not be permitted within the boundaries of the identified centres.

2.37 **Policy DM8 (Primary Shopping Frontage)** confirms that within the Primary Shopping Frontages of Winchester, Whiteley, Bishop's Waltham, New Alresford and Wickham, retail (A1 Use Class) should be retained as the main use and the loss of retail uses at ground floor level will be resisted. In exceptional circumstances changes of use from A1 retail will be permitted where they accord with the Development Plan and:

- The proposal would improve the vitality and viability of that part of the town centre;
- The proposal will not undermine the retail function of the centre or disrupt the shopping pattern/footfall of the centre, and will attract people to the centre; and
- No more than 20% of the defined frontage will be in non-A1 use within 25m of the development as a result of the proposal.

2.38 **Policy DM9 (Secondary Shopping Frontage)** confirms that proposals for development within Use Classes A1 (retail), A2 (financial), A3 (restaurant), A4 (pubs) and A5 (hot food takeaways) will be permitted within the Secondary Shopping Frontages identified in Winchester Town Centre. Proposals which would result in a net loss of Class A1-A5 floorspace at ground floor level will only be permitted within the identified Secondary Shopping Frontages where no more than 20% of the defined frontage will be in non-Class A use within 25m of the development as a result of the proposal.

Winchester District Local Plan 2038

2.39 The Council agreed at its Cabinet on 18 July 2018 to launch preparation of a new Local Plan. The Local Plan will include a range of strategic and detailed planning policies to inform the location, scale and appearance of developments. When adopted, it will form part of the Development Plan for the area. A Local Plan Launch Consultation ran for 6 weeks in 2018; all of the responses were reported to the Council's Cabinet Committee in December 2018. The Local Plan was originally expected to be adopted at the end of 2021 and cover the period to 2036. This has been delayed and the end date extended to 2038 but this Study continues to consider the original Plan period to 2036. This is because of the difficulty in accurately predicting beyond a 5 year period.

2.40 Once adopted, the new Local Plan will supersede the current Local Plan Parts 1 and 2. The findings of this study will help to inform retail and town centre policies for the new local plan, and whether there is a need to allocate new sites to support town centre uses.

Central Winchester Regeneration Supplementary Planning Document (2018)

2.41 The Central Winchester Regeneration Supplementary Planning Document sets out a Vision, Objectives and Planning and Urban Design Framework for the future development of the Central Winchester Regeneration (CWR) area.

2.42 The SPD's vision for the CWR Area is for the delivery of mixed-use, pedestrian friendly quarter that is distinctly Winchester and supports a vibrant retail and cultural/heritage offer which is set within an exceptional public realm and incorporates the imaginative re-use of existing buildings.

2.43 The SPD provides illustrative guidance for nine streets and spaces within Winchester. A summary of this guidance is provided below;

- The Broadway (the Council seeks to improve the public realm of the area and improve its usability for markets and events (which are considered highly desirable by stakeholders and the community);
- Lower High Street (the Council seeks to retain this area as a pedestrianized zone);
- Riverside Walk (the Council considers that this could be a new public shared service street running north-south through the CWR area);
- Tanner Street & Cross Keys (the Council considers that this street could be redeveloped as a shared surface street, transforming it from its current environment as a service road into an actively fronted and busy street with pedestrian and cyclist priority);
- Middle Brook Street (the Council aims for this street to be reinvigorated as an actively fronted and vibrant shopping street linking to the High Street Quarter);
- Antiques Market (the Council considers that the retained and refurbished Antiques market building could have a new public space around it, with improved access and pedestrian permeability between Middle Brook Street and Tanner Street);
- Friarsgate Passage (the Council envisages this passage to be a pedestrian lane);
- Silver Hill (the Council considers that Silver Hill could be extended to the east and connect to the Riverside Walk – which in turn would enhance permeability across the CWR area and provide access to the north site of the Woolstaplers' Hall); and
- Friarsgate (the Council considers that this area could be redeveloped with a bus hub located on the existing Middle Brook Street car park site).

SUMMARY

2.44 In summary, the underlying objective of both the NPPF and Local Plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations 'first'. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping (discussed further in Section 3).

2.45 Winchester City Council has adopted policies which seek to increase the provision of housing in certain neighbourhoods surrounding Winchester (e.g. Barton Farm, West of Waterlooville and North Whiteley). The Winchester Local Plan includes specific policies for mixed use sites (e.g. Silver Hill) and encourages new development within the town centre providing it maintains Winchester's role within the hierarchy of retail centres and promotes the town centre as a natural destination for visitors and shoppers. Winchester City Council has recently adopted a Regeneration SPD which provides specific guidance on how certain streets and spaces within the town could be redeveloped.

2.46 If town centre or edge of centre sites cannot be identified to meet the identified needs 'in full', then local planning authorities are required by the NPPF to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre, subject to an assessment of the impact of any proposed retail and town centre uses on the vitality and viability of existing centres.

3. NATIONAL RETAIL AND TOWN CENTRE TRENDS

3.1 This section summarises the findings of our research into the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. We then consider changes in the retail and leisure sectors and their impact on town centres from a regional perspective, and where information is available, how these trends translate to centres in Winchester District.

ECONOMIC OUTLOOK

3.2 The UK economy has been characterised by a low growth trajectory over the last 18-24 months. Figures provided by the Office for National Statistics (ONS) show that UK GDP increased by +0.3% (quarter-on-quarter) in the third quarter (Q3) of 2019. This represented a +1% year-on-year increase since 2018 (Q3) and was the weakest growth recorded since 2010 (Q1).

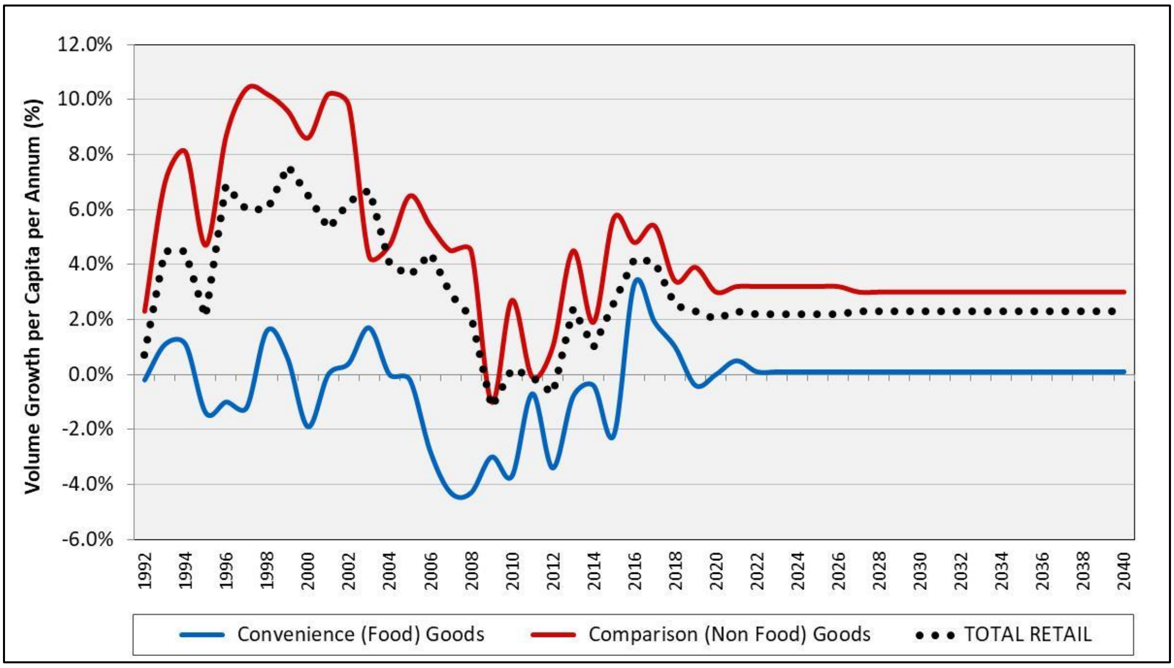
3.3 Forecasts (pre the Coronavirus pandemic) at the start of the year indicated that the UK economy will remain on a low growth path in 2020 due to the uncertainty created by the Brexit transition period (which ends in December 2020) and the sluggish global economy. The forecasts provided by Experian Business Strategies (Experian) as set out in their latest *Retail Planner Briefing Note 17* ('RPBN') published in February 2020 do not take account of the potential impact of Coronavirus on the economy, but they nevertheless predict low GDP growth of between +1% to +1.5% in 2020 and 2021 respectively. This compares with average annual GDP growth of around 2% over the period 2010 to 2018. Experian forecast higher average growth of circa 1.8% per annum over the medium term, between 2022 and 2026, but this is still below previous trends.

3.4 Consumer spending has been a key driver of economic growth since the EU referendum in June 2016, although there have been increasing signs that growth is starting to "soften". Figures show that household spending slowed to an eight year low (+1.2%) in 2019 due principally to the impact of Brexit on consumer confidence. Notwithstanding robust labour market conditions in 2019 (including the creation of 300,000 jobs), incomes growth averaged just 1%. Forecasts show that real incomes growth will average +1.3% in 2020 and consumer spending growth will remain below +1.5% on average. Over the medium term (between 2022 and 2026) Experian forecast consumer spending growth will average around +1.8% per annum.

3.5 Retail sales volumes grew by +3% in 2019, which was the weakest performance since 2014. There was a marked slowdown in growth during the year, which reflected low consumer confidence and sluggish incomes. The most significant impact on retail sales has been on department store operators and household goods retailers. Demand for household goods has suffered as the housing market remained in the doldrums for a second year. In contrast, sales from predominantly online retailers picked up momentum with a +15% growth for 2019, up from +10% in 2018. Overall the prospects for retail sales growth remain subdued, as the economic recovery is not yet assured and any increase in household incomes will be modest in 2020 (for the reasons mentioned above). As a result, Experian forecast that retail sales growth will continue at a sluggish rate of around +2.5% in 2020 and 2021. Any short term growth will be further impacted by the "fall out" from the Coronavirus pandemic. Over the medium term (2022 to 2026) Experian forecast slightly higher average annual growth of +2.7% per annum.

3.6 As the figure below shows, these economic trends are reflected by the year-on-year actual growth in retail (convenience and comparison goods) spending per head between 1992 and 2019, and the forecast growth for the period 2020 to 2040.

Figure 3.1: Forecast year-on-year growth in retail expenditure per capita



Source: Experian Retail Planner Briefing Note 17 (February 2020). Figures 1a and 1b

3.7 The dramatic impact of the 2007/2008 economic downturn and recession on retail spending growth is clearly illustrated. The latest forecasts by Experian show **total retail spend** growth per capita of +2% in 2020 and +2.3% in 2021. This is significantly below the historic average annual growth of +5.4% for the period 1997 and 2007, and +3.5% between 1997 and 2018. Experian predict that growth over the medium term, between 2022-2026 will average around +2.2%, with longer term growth forecast at +2.3% for the period 2027-2040.

3.8 For **convenience goods**[2] there was negative average spending growth over the ten year period from 2005 to 2015. Following a period of growth between 2016 and 2018, Experian's figures show a return to negative growth in 2019 (-0.4%) and no growth in 2020. Growth over the medium to long term is predicted to 'flat line' at around +0.1%. As we describe below, the negative growth in convenience goods spending has had a significant impact on the grocery sector and on retailer business models over the last 10-15 years.

3.9 For **comparison goods**[3] the figure shows year-on-year growth rates recovering from a low of -1.0% in 2009, to a high of +5.7% in 2015. However, Experian predict that growth will be relatively muted in 2020/2021 at around +3%, and this could now be lower than forecast due to the impact of the Coronavirus pandemic on consumer confidence and spending. Over the medium term between 2022-2026 Experian forecast average growth of +3.2%, with a slight fall in growth to +3% per annum over the long term (i.e. 2027-2040). It should also be noted that the medium to long term growth forecast is significantly below the historic long term trend of +8.5% per annum for the period 1997 to 2007. It is this consistently high growth rate that largely fuelled the growth in new retail floorspace development and retailer expansion over this period.

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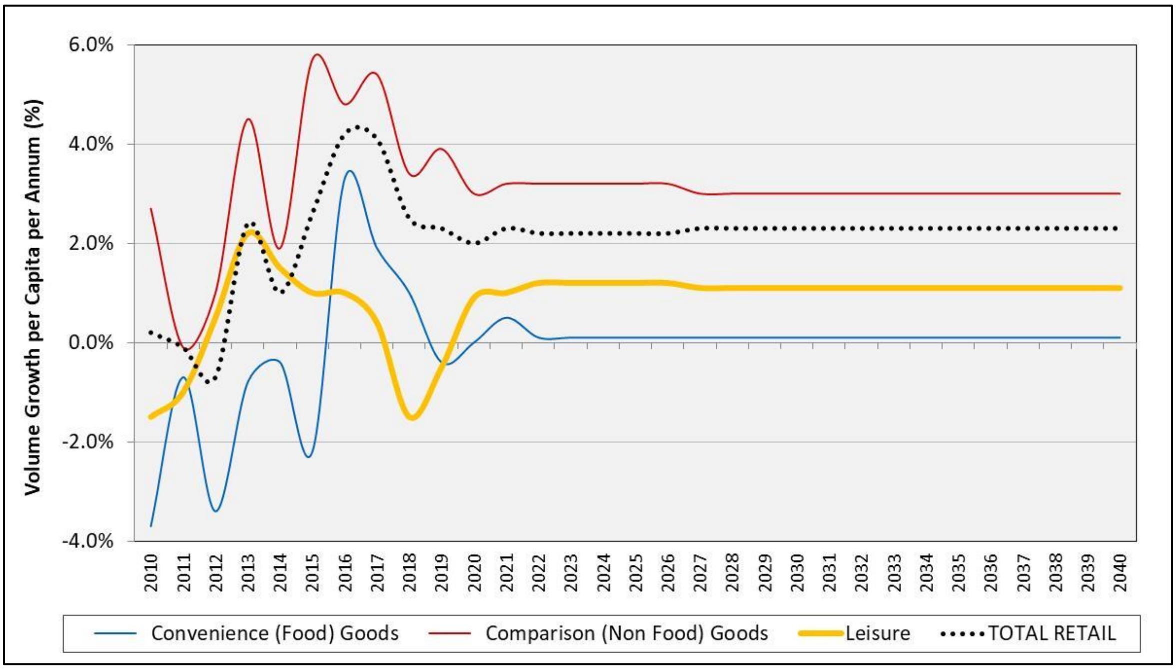
[2] Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

[3] Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods.

3.10 The figure below compares the actual and forecast annual growth in leisure spend per capita with retail over the period 2010 to 2040 based on Experian's latest RPBN17.

Figure 3.2: Forecast year-on-year growth in retail and leisure spend per capita



Source: Experian Retail Planner Briefing Note 17 (February 2020). Figures 1a and 1b

3.11 The figure shows that leisure spend is forecast to grow at between +1% and +1.2% over the period 2020 to 2040. This is higher than the average growth forecast for convenience goods (+0.1% per annum), but lower than for comparison goods (+3% to +3.2% per annum). The forecast average growth in leisure spend is consistent with the historic average growth of +1.1% recorded between 2012 and 2018, and significantly higher than long term trends of -0.6% between 1997 and 2018.

3.12 Any further dampening of growth rates over the medium to long term will have implications for the viability of existing retail and leisure businesses and the take-up of new space, as well as the potential to support new businesses over the forecast period. These expenditure growth trends and forecasts are key drivers of the assessments of retail capacity (Section 7) and leisure needs (Section 9).

THE RISE OF ONLINE SHOPPING

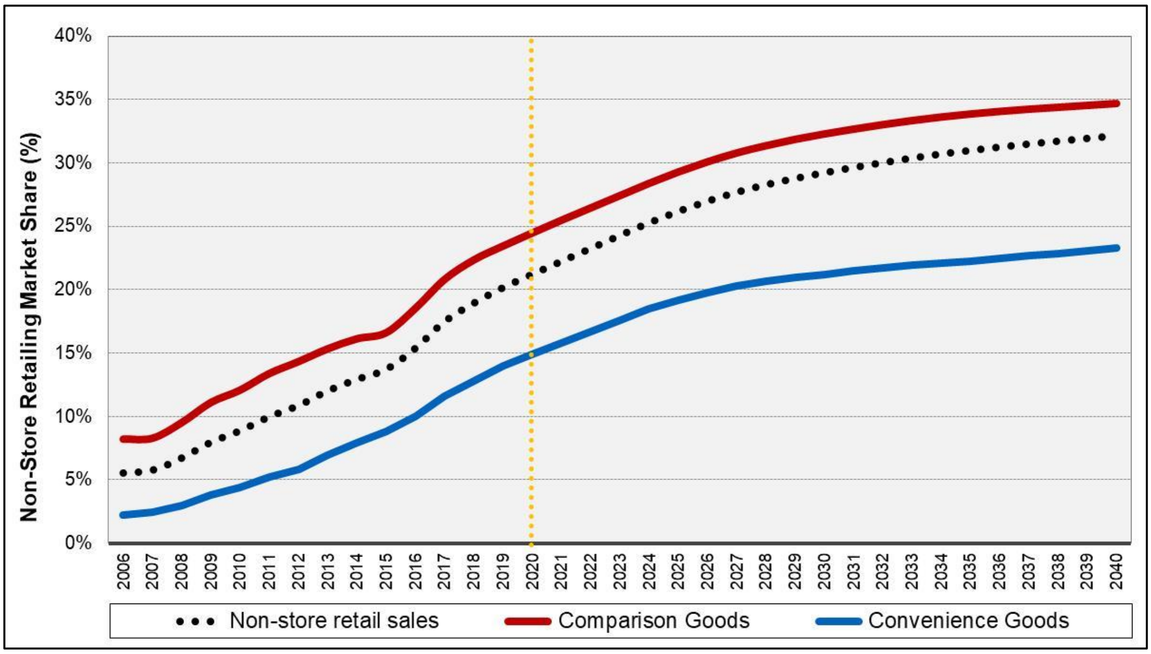
3.13 The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour, and the retail sector over the last decade. Non-store retailing, which principally comprises internet shopping, is commonly referred to as *Special Forms of Trading* (SFT)[4],

3.14 The latest ONS figures estimate that the value of non-store retail sales (including the internet) stood at £84.1bn in 2019 (in 2016 prices). Total non-store sales have increased significantly from £17.1bn in 2006 and from £29bn in 2010. As the table below shows, SFT's overall market share, as a

[4] **Special Forms of Trading** (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

proportion of total UK retail sales, has increased from 5.5% in 2006 to 21.2% in 2019. In other words online now accounts for more than one in every five pounds spent on retail goods.

Table 3.3: SFT's Market Share of Total Retail Sales



Source: Experian Retail Planner Briefing Note 17 (February 2020). Appendix 3, Figure 5.

3.15 Experian forecast total SFT market shares will increase to 26.2% by 2025, 29.2% by 2030 and 32.1% by 2040 (i.e. one in every three pounds spent on retail in 20 years' time will be online). The most recent Experian figures set out in RPBN17 show a higher growth in market shares to 28.3% by 2028 compared with their previous forecasts in 2019 (RPBN16). Other research[5] suggests that the growth could be even faster than forecast by Experian, with online sales predicted to overtake store-based sales within the next 8-10 years, accounting for a substantial 53% of total retail sales by 2028.

3.16 This growth will be driven by the significant improvements in the convenience and choice of online purchasing through further advances in smartphones, mobile/wearable technology and Artificial Intelligence (AI), alongside improved web-based platforms and social media. The expansion of 5G and fibre networks, cheaper and faster deliveries (including the potential for drone deliveries, autonomous delivery vehicles, etc.), more 'click-and-collect' options and easier return processes will also provide the platform for increasing online purchases.

3.17 Notwithstanding the strong medium term growth, Experian forecast that the pace of e-commerce growth will slow over the long term. This is because internet use is now very extensive at 91% of all UK adults and virtually 100% for those aged between 16 and 44 years in 2018 according to ONS statistics. Hence, growth of the internet user base will be less of a driver than it has been in the past decade. Instead, generational differences in internet use will increasingly drive growth. For example, the 'Millennials' (defined as anyone born between 1981 and 1996) and 'Generation Z' (anyone born between 1997 and 2010) generations have been born into digital environments and use technology more intensively. These groups will account for half of the adult population by the end of the 2020s (compared to 39% in 2019) and the bulk of retail spending. Their preference for online shopping

[5] 'The Digital Tipping Point – 2019 Retail Report' (Retail Economics and Womble Bond Dickinson)

could well represent the "*tipping point*" for the retail industry as a whole[6]. As a result high streets, town centres and physical retailers will need to work even harder to attract and retain these generational groups as customers.

3.18 When it comes to forecasting the potential capacity for new physical retail floorspace, is should be noted that Experian identify that 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 through '*virtual'* stores and/or *'dot com'* distribution warehouses. On this basis, Experian has adjusted their SFT market shares downwards to reflect their estimates of the proportion of internet sales sourced from existing stores. As a result the SFT market share of total retail sales is reduced to 13.6% in 2020, 17% by 2025, 21.2% by 2030 and 23.3% by 2040. In line with standard approaches these adjusted/recalibrated market share figures are used as a benchmark for the retail capacity assessment in Section 8 to this report.

3.19 Notwithstanding this, it is clear that the "*digital revolution*" and growth of online retailing has had a significant impact and is having a significant impact on Britain's retailers, sales and high streets. 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 (examples being the rationalisation of HMV and GAME stores across the UK). However this does not mean that other comparison goods categories are immune to the impact of the internet. For example, there has been an increase in online fashion 'stores' and purchases over the last decade. These trends are clearly illustrated by the survey-derived SFT/internet market shares for different categories of comparison goods expenditure described in **Section 6**.

3.20 The impact of the "*digital revolution*" is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand through say Netflix or Amazon Prime. Social media, Skype, email and instant messaging are also displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences has accelerated dramatically as a direct result of the COVID-19 pandemic, and in the process exacerbating a *'digital divide'* between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that serve the day-to-day needs of their local (high street) communities. Yet the success of businesses at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.

3.21 In summary, both retailers and high streets will need to compete for shoppers and expenditure through a variety of means including creating experiences that will attract the interest and attention of potential consumers across all age and socio-economic groupings. We comment later in this section on the emerging trend in convergence between physical and online retailing.

RETAILER BUSINESS MODELS AND REQUIREMENTS

3.22 As described above, the challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. In turn, this has created significant challenges for traditional "*bricks-and-mortar*" retailing and the high street. As a consequence, national multiple retailers are having to constantly review and rapidly adapt their

[6] 'The Digital Tipping Point – 2019 Retail Report' (Retail Economics and Womble Bond Dickinson)

business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.

3.23 These dynamic trends are best illustrated by the changes in the grocery sector over the last decade. Following a sustained period of growth over circa 25 years up to 2010, principally driven by new larger format store openings in predominantly edge and out of centre locations, the business models for the top-5 main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) have shifted dramatically. Today their focus is on growing market share through online sales and new smaller convenience store formats (including Tesco Express, Sainsbury's Local and Little Waitrose). As a consequence applications for large store formats have slowed to a virtual standstill over the last decade and extant permissions have not been implemented. Outside of the so-called top-5 grocers, the 'deep discount'[7] food operators (namely Aldi and Lidl) have significantly increased their respective market shares through new store openings.

3.24 The non-food retail sector has also experienced a significant impact from the rise of online shopping, and the challenging economic and property market environment. Many well-known retailers have either closed over the last decade, or have significantly reduced their store portfolios. The table below shows some of the higher profile retailer "*casualties*" since 2008:

[7] Also referred to as 'Limited Assortment Discounter' ('LADs') by the Competition Commission Report.

Table 3.1: The Largest Retailers that have gone in Administration since 2008

Year	Retailers / Brands	Stores	Employees	Sector
2019	Select	180	2,000	clothing
2019	Debenhams	165	25,000	department
2018	HMV	133	2,200	music, DVD, games
2018	House of Fraser	59	17,500	department
2018	Poundworld	350	5,300	discount
2018	Wine Rack / Bargain Booze	760	4,000	off licences
2018	Maplin	200	2,500	IT
2018	Toys 'R' Us	105	3,200	toys & games
2017	Palmer & Harvey	-	4,000	wholesaler
2017	Store Twenty One	76	1,080	clothing/variety chain
2016	BHS	164	11,000	clothing/variety chain
2016	Brantano	200	2,000	footwear
2014	Phones4U	550	5,600	mobile phones
2013	HMV	238	4,350	music
2013	Blockbuster	528	4,190	DVD rental
2012	Comet	236	7,000	electricals
2012	Clinton Cards / Birthdays	767	8,500	cards, gifts
2012	Game	600	6,000	video games
2012	Peacocks	550	9,600	clothing
2012	JJB Sports	250	6,300	sportswear
2012	Alexon	990	2,700	clothing
2011	Focus DIY	170	3,919	DIY
2009	Wine Rack / Threshers / Bottoms Up / Victoria Wine	1,300	6,500	off licences
2009	Zavvi	150	3,500	music
2008	Ethel Austin	300	3,100	clothing
2008	Adams	271	3,200	children's clothing
2008	Woolworths	820	30,000	variety chain
2008	Stead & Simpson (Shoe Express / Lilley & Skinner / Peter Briggs)	375	3,000	footwear
2008	Faith Shoes	284	2,000	footwear
2008	Roseby's	280	2,000	furnishings
2008	Motor World	284	2,235	car accessories
2008	MFI (Hygena / Schreiber)	173	1,100	furniture
2008	Stylo Shoes / Baratts / Priceless	1,067	5,400	footwear
2008	Allied Carpets	273	2,300	floor coverings
2008	Blacks Leisure	400	2,640	outdoorwear
	TOTAL:	**13,248**	**204,914**	

Source: Centre for Retail Research (2020)

Notes: The figures relate to retail corporations that went into legal adminstration in the year shown. CRR state that the test for inclusion is: (a) administration; and (b) national significance. The table does not indicate or purport to show whether the company has disappeared, such as Woolworths, or still survives in a robust manner, such as HMV or Peacocks. Appearance in the table does not imply that the brand is no longer used or does not trade. Where a retailer has suffered several failures the date used is normally the one where most assets or staff were involved. Retailers that have shrunk their businesses without going through administration are not included.

3.25 The latest high profile retail failures include Mothercare, whose UK business was placed into administration in November 2019. At the start of 2020 the department store chain Beales also collapsed into administration, resulting in the closure of its 23 stores and the loss of some 1,300 jobs. Other operators that have entered into administration in early 2020 include Hawkins Bazaar and Oddbins. Edinburgh Woollen Mills has also acquired 200 Bonmarche stores, but this still leaves over 70 stores in administration and under the threat of closure (for example, Debenhams, L K Bennett, Oasis and Warehouse, Kath Kidston, Brighthouse, Laura Ashley to name but a few). Further to these administrations, there is another wave of retailers who have had to restructure and reduce their store portfolios over the last 5-10 years, including:

- **New Look:** entered into a Company Voluntary Agreement (CVA)[8] in 2018 and closed 60 out of its 593 stores, resulting in the loss of circa 1,000 jobs. These include flagship stores in London's West End and further closures are anticipated.
- **Ikea:** reported a near -40% fall in profits in 2017 and pulled out of opening a new store in Preston in 2018. The retailer blamed higher wages and the cost of investments in its stores and website. It subsequently announced that it is to close its Coventry City Centre store in Summer 2020, as it has made consistent losses since it opened in 2007.
- **Boots:** announced in June 2019 that it will close 200 stores out of its total 2,500 store portfolio in an attempt to cut costs. On the positive side, it has opened a new format 2,787 sqm store in London's Covent Garden branded as "*Beauty and Wellness Halls*".
- **Marks & Spencer**: has closed some 53 of its 1,036 stores since 2016 in secondary cities and towns across the UK[9]. In addition, it announced in Summer 2019 that it had earmarked an additional 110 poorly performing stores for closure or change.

3.26 It is apparent that national retailers with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment. The higher costs of trading from high streets compared with online and out-of-centre retailing, also means that it is not a "*level playing field*". This is a further contributing factor to the significant number of store closures that have occurred over recent years.

3.27 Research shows that in total there was a net closure of some 7,550 retail units across Great Britain in 2019 and vacancy levels rose to almost 13% (expressed as a proportion of total outlets), compared with 7% in 2006[10]. Some analysts suggest that there is as much as 30% too much physical space in the retail sector. The increase in long-term vacancies and concentrations of vacant properties in centres can lead to a *'spiral of decline*', engender feelings of neglect and lack of investment confidence in town centres, which in turn "pushes" more people to shop online.

3.28 Notwithstanding the negative news headlines, there are still success stories within the retail sector. For example, Primark opened its largest store (14,957 sqm) in Birmingham in April 2019, which is comparable to the floorspace and layout of a more traditional department store operator. Greggs has also been one of the high street's recent star performers with a significant increase in sales in 2019. A number of retailers are responding to the competitive challenges in the retail sector by launching new formats aimed at providing consumers with enhanced retail experiences. For example, Pets at Home launched its interactive '*Store of the Future'* format in May 2019.

3.29 In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many are struggling to position themselves quickly enough to absorb rising costs and engineer the vital transition to a more technology-focussed business model. However, even with a big on-line presence this has still not stopped some of the high streets more familiar stores such as Debenhams and Laura Ashley going into administration.

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[8] A Company Voluntary Arrangement (CVA) allows a company to enter into a legally binding agreement with its creditors, which could include suppliers or landlords, to reach a compromise agreement and avoid an administration or liquidation. A CVA can therefore provide a company with some 'breathing space' to allow it to reorganise or restructure its funding and/or its operations with as little disruption as possible. However, the CVA process has been controversial as some landlords believe some retailers are using it as a tool to push down rents without any hard evidence of business failure.

[9] M&S stores that have closed since 2016 include outlets in Andover, Basildon, Birkenhead, Bournemouth, Bridlington, London Covent Garden, Dover, Durham, Fareham, Fforest-fach, Keighley, Portsmouth, London Putney, Redditch, Slough, Stockport, Warrington and Wokingham). Clacton-on-Sea; Darlington; East Kilbride; Falkirk; Fleetwood (outlet), Lancashire; Holloway Road, North London; Kettering; Newton Abbot (outlet); Newmarket; New Mersey Speke, Merseyside; Northampton; Stockton; Walsall; Antrim (the Junction); Ashford; Barrow; Bedford; Boston; Buxton; Cwmbran; Deal; Felixstowe; Huddersfield; Hull; Luton Arndale; Newark-on-Trent; Northwich; Rotherham; Sutton Coldfield and Weston-super-Mare

[10] Source: Experian Goad

RISING OCCUPANCY COSTS

3.30 As described above, physical retailers are having to absorb higher than inflation increases in occupancy costs year-on-year due to rises in, for example, rents, business rates, service charges, staff costs, etc. Research shows that, on average, retailers' operating costs increased by +3.5% in 2018, which outpaced sales growth for many retailers, eroding profitability and resulting in more store closures.

3.31 As described above it is not a "*level playing field*" between high street and online retailing, and between high street and out-of-centre retailing. In response to the budgetary challenges from rising costs and tight margins, retailers will need to drive up efficiencies and productivity from existing floorspace to remain viable.

3.32 It is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. In their latest *Retail Planner Briefing Note* (RPBN) Experian provide forecasts of annual floorspace productivity growth rates based on two different scenarios:

(i) the '**constant floorspace scenario'** - based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and

(ii) the '**changing floorspace scenario'** - takes account of the impact of new retail development on average retailer sales performance.

3.33 The table below sets out the differences between the two scenarios, informed by Experian's predictions of changes in retail floorspace over time and after making an allowance for 'non-store' (SFT/internet) retailing.

Table 3.2: Floorspace Productivity Growth Rates (year-on-year growth %)

	2018	2019	2020	2021	2022-2026	2027-2040
CONSTANT FLOORSPACE:						
Convenience Goods	-0.2%	-1.4%	0.3%	0.7%	0.3%	0.4%
Comparison Goods	3.0%	3.6%	2.6%	2.8%	2.8%	3.1%
CHANGING FLOORSPACE:						
Convenience Goods	-0.2%	-1.4%	0.3%	0.5%	0.0%	0.0%
Comparison Goods	3.0%	3.6%	3.6%	3.6%	3.2%	2.7%

Source: Experian Retail Planner Briefing Note 17 (January 2020). Figures 3b/3c/4a/4b.

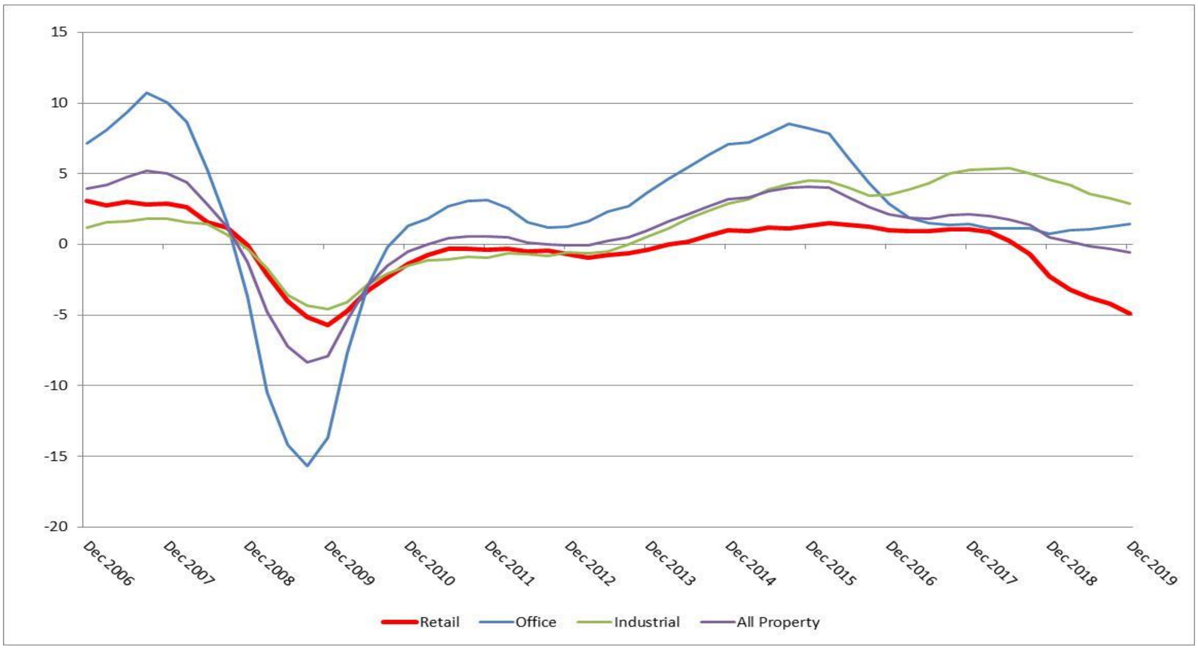
3.34 As Experian explain, on-going budgetary pressures mean that retailers will seek to increase efficiencies from current floorspace: including through redevelopment/repurposing of existing floorspace, adoption of new technology and innovations, more effective marketing strategies and using internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK. Experian conclude that these trends confirm the limited prospects for new retail floorspace development. For these reasons the national 'productivity' growth rates based on the *'constant floorspace scenario'* are preferred as they better reflect national trends and the need for existing retailers to increase their sales potential to remain viable.

RETAIL & SHOPPING CENTRE INVESTMENT

3.35 The rise in the number of retailer "*casualties*" and vacancy levels has created a challenging environment for existing retailers and investments in towns and shopping centres across the UK. The current investment climate is becoming increasingly polarised. The top 50 shopping locations generally have the best prospects for attracting new investment and development. This is because they benefit from strong catchments and the necessary critical mass of shops, leisure facilities and other uses to remain commercially viable and attractive investment propositions. Outside of the top 50 it is the more secondary towns and shopping locations, such as Whiteley, and the Winchester's district's centres (i.e. Bishop's Waltham, New Alresford, and Wickham), that remain vulnerable to further reductions in their existing retail and commercial offer. This is against the backdrop of limited and falling demand for new shops and commercial space.

3.36 Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. In turn this fall in demand is impacting on property values and rents. For example, recent LSH research shows that the retail sector recorded a +4.9% year-on-year fall in rents in May 2019[11]. As the figure below shows, retail has performed poorly compared with the other property sectors since the economic crisis in 2007/08.

Figure 3.4: Average Rental Growth (% Change Year-on-Year)



Source: MSCI

3.37 It is apparent that many centres and shopping locations across the UK are "*over shopped*"; meaning that the supply of retail floorspace significantly outstrips market demand. Many centres simply have too much retail floorspace stock, or they have the "*wrong type*" of retail floorspace in secondary and prime pitches in centres across the UK that do not meet the needs of modern national retailers for larger format shop units. This over-supply of retail floorspace and limited market demand is placing further pressures on the viability of existing stores and shopping centres. In turn, this makes it difficult for landlords, investors and retailers to justify additional capital expenditure.

3.38 In many centres across the UK landlords are also struggling to retain existing tenants, let alone attract new retailers into vacant shops. In the current climate occupiers are negotiating shorter lease terms and greater incentives from landlords to continue trading in the face of increasing online competition and economic uncertainty. This will also force down rents and profits across more marginal, secondary shopping locations.

[11] LSH research using MSCI data

3.39 Due to the underlying crises in the retail sector mainstream financial investors have increasingly exited the sector citing rising vacancy rates, the growth of online shopping and increased costs.

3.40 Notwithstanding this trend, low-cost funding available from the Public Works Loan Board ('PWLB') and other funding options has resulted in local authorities purchasing different property assets for both income-generation and re-generation purposes. Recent joint research between LSH and Revo entitled '*Fixing Our Broken Town Centres'* has identified that Councils have spent a record £775m buying shopping centres over the past three years, and are expected to outlay a further circa £200m in 2020. The investment and business rationale for the purchase of many of these shopping centres assets is to provide local authorities with more control of the planning, regeneration and management of their town centres. Test Valley Borough Council's purchase of the Chantry Centre in Andover from Aviva for £7.2m in April 2019 is a good example of where the local authority is taking a proactive role in maintaining and enhancing the vitality and viability of its town centre. There are other examples across the UK of Councils "*taking back control*" of their town centres. Whilst this is extremely positive news, prior to the outbreak of the COVID-19 pandemic, the Government launched a consultation 'Public Loans Works Board: future lending terms' (March 2020). In this consultation document the Government was requiring Council's to confirm that they do not plan to use a Public Works Loan to buy investment assets primarily for yield. The consultation was due to conclude on the 4th June 2020 and it is unsure at this stage whether these changes will happen and potential the impact that this might have on the enthusiasm for Council's to invest in town centres (i.e. to fund the purchase retail stores or shopping centres).

OUT-OF-CENTRE RETAILING

3.41 The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. As described above, the main grocery retailers have pulled back from new larger format superstore openings in edge and out of centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets. The exception to this is the deep discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out of centre locations.

3.42 Vacancy levels in out-of-centre retail warehouses and parks have also increased over the last decade following the closure of major operators (such as, for example, Toys R Us Poundworld, Office Outlet, etc.), and a reduction in the store portfolios of other major out-of-centre retailers (such as, for example, B&Q and Homebase). There are likely to be further increases in closures, particularly in the poorly performing *"first generation*" and secondary shopping locations, as leases come up for renewal and more retailers go into administration. As a result a number of out-of-centre foodstore and retail warehouse sites are being repurposed and/or redeveloped for alternative uses, including new residential uses.

3.43 Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and convenient access to the road network. This is still an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and *"replaced"* these with 'Simply Food' branded stores in out-of-centre. The most local examples include the closure of the M&S department store in Portsmouth Town Centre in March 2018 and the subsequent opening of a Simply Food branch at Ocean Retail Park a month later. The company closed their department store in Fareham Town Centre in April 2018, which was followed by the opening of Simply Food at Brockhurst Gate Retail Park in nearby Gosport. M&S also closed their department store in Andover Town Centre in April

2018 and it is understood are seeking an alternative location for a Simply Food outlet. These examples demonstrate that retailers who previously anchored the vitality and viability of town centres, are now competing directly with high streets for shoppers, spend and sales.

COMPETITIVE RESPONSES TO THE RETAIL 'CRISIS'

3.44 Falling market demand, rising costs and increasing competition from online and out-of-centre shopping is resulting in more vacant retail space due to retailers either downsizing their portfolios (e.g. Marks & Spencer), or entering into administration (Debenhams, Laura Ashley, Maplin / Toys-R-Us to name but a few). The current and future challenges for many high streets and shopping locations will be how to retain existing businesses, fill/replace the voids and attract new investment.

3.45 In those cases where retail vacancies are long-term and more often than not concentrated in secondary shopping streets/pitches, it will be necessary to plan for alternative uses and/or consider options for redevelopment. This may include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate alternative uses such as business start-ups, art studios and galleries, community/youth centres, etc. Another option is for *'pop-up'* and '*meanwhile uses/leases'*, which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Other options include the conversion or redevelopment of former retail units to residential.

3.46 Although the multiples/brands will remain important anchors for shopping locations, helping to generate trips, footfall and spend, the successful town centres of the future will be characterised by a more diverse mix of independent businesses. Street markets and market halls can also provide the platform for new businesses to grow and flourish, and make significant contributions to the overall vitality and viability of centres, and local economies. This is recognised by the NPPF (see paragraph 85). The *Portas Review*[12] also identified markets as an important contributor to the future of successful town centres. The successful and thriving markets of the future will be those that are able to respond to the changing needs of a town's catchment population. At the same time successful markets can appeal to a wider customer profile, attracting visitors from outside a town's "normal" catchment area and helping to increase footfall and linked trips to the benefit of other shops and businesses. These concepts could be used to bring vacant buildings and sites back into use and whilst there may not be sites available now, vacancies could come forward as a result of the impact from COVID-19.

3.47 The convergence of online and physical space also represents a further competitive response to the challenges facing our town centres and high streets. For example, both 'Amazon' and 'eBay' are trialling the use of physical space to showcase their services and goods. Amazon's *"Clicks and Mortar*" stores have been trialled in Manchester, Cardiff, Edinburgh and Sheffield, and offer more than 50 local and national ecommerce businesses the opportunity to explore customer-facing trade for the first time to help drive growth, with the benefit of in-store business advisers and workshops to help build their skills in selling both in-store and online. In Wolverhampton, eBay also opened its first concept store in April 2019. Branded as '*Home Grown'*, it provided a temporary physical space to showcase eBay's initiatives to help local businesses evolve for the 21st Century through physical and online retail sales. eBay's partnership with City of Wolverhampton was on the back of research that showed that many small-scale retailers and independent business in the UK do not necessarily have an online presence aimed at generating sales through a defined website, social media channel

[12] The Portas Review: An independent review into the future of our high streets (2011)

or presence on an online marketplace. Other purely online retailers are also considering this crossover into physical space including Boohoo (fashion retailer), Sonos (speaker systems) and Birchbox (cosmetics). Although their requirements are limited at present, it nevertheless illustrates that there is interest and an appetite for physical space from online retailers as part of their wider multi-channel business strategies. This omni-channel approach to retail could help to drive market demand as more traditional physical retailers close on the High Street.

3.48 There are also wider digital technological changes that together will impact on the future of town centres and the way the nation lives, shops, works, plays and carries out a wide range of activities. Smart Cities, Artificial Intelligence (AI) and 5G will continue to redefine the infrastructure and interactions between consumers, commercial businesses, public services, and other uses and activities. At this stage we can only speculate about outcomes, but examples exist of how technology is currently being used to increase trips and footfall in centres. For example:

- In Bristol the '*Gromit Unleashed'* sculpture trails were first established in 2013. They positioned 80 artist-designed 'Gromit' sculptures across the city. Visitors were then invited to go on a smartphone-guided sculpture hunt, allowing them to find and record the various 'Gromits' dotted throughout Bristol. An understanding of place together with public interest provided the necessary first step in getting people interested.
- Dorchester's free public Wi-Fi was funded on the back of research that showed that consumers stay longer in a town centre if there is free Wi-Fi available. It has enabled retailers to connect with their customers through social media and mobile technology with the aim of encouraging more footfall.
- Lichfield sought to increase the publicity for its High Street shops through social media. Businesses around the city have played their part by simply taking photos of their products and services and posting them to social media feeds. This has generated a wide interest.

3.49 Some of the examples above could be applied to Winchester Town Centre and could be achievable in the short term. Walking trails linked to the town centre's heritage that utilise augmented reality via mobile phone applications could help to engage younger people. Upgrading the town centre's digital infrastructure, such as mobile charging points and free wifi, could come forward alongside other infrastructure work that is already scheduled. Marketing the town centre through better social media exposure should form part of any new marketing strategy coming forward for the town centre. Whilst the long term implications for the high street of the convergence between online and physical retailing and increased digital connectivity remain unclear, what is certain is that they are unlikely to take up the same level of space as conventional retailers in the past. The space they do take will form part of a wider set of channels through which sales are generated.

Changes to Permitted Development and the Use Class Order

3.50 At the time of preparing this study the Government had just published legislation in Parliament to create new permitted development (PD) rights allowing vacant commercial units in town centres to be converted to housing without planning permission.

3.51 The Government also published revisions to the Use Class Order which seek to *"amend and simplify"* the system. A new and broad Class E. 'Commercial, Business and Service' use class has been created that represents town centre uses. From the 1st Septembers 2020 a new use Class E will replace the following existing use classes:

- Class A1 - shops;
- Class A2 - financial and professional services;
- Class A3 - restaurants and cafes; and
- Class B1 - business.

3.52 Class E will also include certain former D1 and D2 uses such as indoors sport, recreation and fitness facilities, medical and health facilities, crèches and day nurseries, research and development facilities, and light industrial uses.

3.53 Changes to another use, or mix of uses, within the new Class E will not require planning permission, which the Government hopes will allow greater flexibility for business to *"adapt to changing circumstances and to respond more quickly to the needs of their communities*".

3.54 Licenced drinking venues (previously A4) hot food takeaway (previously A5) will be considered 'Sui Generis' uses alongside concert, dance and bingo halls (previously D2). Changes to and from these uses will be subject to planning permission.

3.55 There will also be a new Class F1 and F2. The new F1 Class will cover learning and non-residential institutions, that relates to educational uses; the display of works of art (otherwise than for sale or hire), museums, libraries, public hall or exhibition hall, places of worship law courts.

3.56 The new F2 Class will include small shops (up to 280 sqm) that mostly sell essential goods, including food, and where there is no other such facility within 1,000 metre radius of the shop's location. The F2 Class will also include a hall or meeting place for the principal use of the local community, outdoor sport or recreation area, and swimming pool or skating rink.

3.57 The planned changes raise many questions, particularly what the changes will mean for current planning policies for town centres, such policies on shopping frontages and primary shopping areas. Also, there is a question on how Class E is applied spatially. For example, will it differentiate between town and out of centre locations.

SOUTH EAST OF ENGLAND RETAIL MARKET

3.58 The South East region is generally considered the second strongest economy (after London), influenced by the fact that the region is the largest and most populous in the UK. Residential values are particularly strong, and alongside London the region is viewed as a good location for commercial investment. From a retail market perspective the region supports a number of key regional shopping destinations as highlighted in Javelin Group's VenueScore[13] ranking. VenueScore is a tool used by investors and operators to gauge the attractiveness of a shopping location. The table below provides a list of the top performing centres/shopping locations in the South East based on their 2017 Javelin VenueScore Ranking.

3.59 As the table below shows, Winchester Town (and Whiteley Shopping Centre) sits outside the top 100 centres in the Javelin VenueScore. For the top performing centres in the region, such as Brighton, Reading, and Southampton, these centres are well established in their retail offer and are unlikely to be significantly affected by changes in the retail market.

[13] Venuescore is Javelin Group's annual ranking of the UK's top 3,000+ retail venues based on provision of multiple retailers including anchor stores, fashion operators, and non-fashion multiples, where each operator is given a weighted score to reflect its overall impact on shopping patterns and the attraction of centres.

Table 3.3: Sub Regional Centres and Shopping Locations in the South East by Rank

Centre	Rank	Market Position	Fashion Position
Brighton	7	Upper Middle	Upper Middle
Reading	16	Middle	Fashion Moderate
Southampton	20	Middle	Fashion Moderate
Bluewater Shopping Centre	27	Upper Middle	Upper Middle
Guildford	29	Upper Middle	Fashion Moderate
Milton Keynes	34	Upper Middle	Fashion Moderate
Oxford	46	Upper Middle	Fashion Moderate
Maidstone	52	Middle	Fashion Moderate
Tunbridge Wells	55	Upper Middle	Updated Classic
Basingstoke	58	Middle	Fashion Moderate
Eastleigh	238	Middle	Updated Classic
Winchester Town	125	Upper Middle	Updated Classic
Whiteley Shopping Centre	332	Upper Middle	Fashion Moderate

Source: Javelin VenueScore 2017

3.60 Centres in the region that fall outside the top 30 ranking will be more vulnerable. For example, Maidenhead, which is ranked 52nd by VenueScore saw a net -8.72% decrease in the number of high street outlets in the town centre in 2018, the highest recorded for centres in the region[14]. Oxford also saw a decline of -3.16%. However, even Reading, which is ranked the second best performing centre in the region experienced a net reduction in high street outlets of -5.97%. The most significant retail investment in the South East region in the past year has been the acquisition of Gastons Wood Retail Park (Basingstoke) by Corum Asset Management from Aberdeen Standard Investments for £20.7m and the acquisition of The Nicholsons Centre in Maidenhead by Areli Real Estate, in partnership with Tikehau Capital, for £25 million. As highlighted previously, the most recent and notable local authority investment in the region was by Test Valley Borough Council who acquired Chantry Shopping Centre in Andover from Aviva for £7.2 million.

3.61 Larger regional centres will continue to attract retail investment. In response to a general slowdown in the retail sector, national multiples are more careful about where they open new stores. As such, interest from retail and leisure operators is and will continue to be focused on stronger centres.

3.62 Smaller centres, such as neighbourhood and local centres, will survive by serving basic local convenience needs and essential services of their local population. The offer provided by neighbourhood and local centres can vary considerably and their vitality and viability can be dependent on their proximity to other centres. Generally, the rise in popularity of top up shopping has helped to sustain the convenience function of smaller centres.

3.63 Consideration needs to be given to medium sized centres and seeking an alternative role to retail.

3.64 It is essential for local authorities to implement strategies for their network of centres. Firstly, by identifying the how the centres are currently serving their local catchments or communities, and whether they are performing against their designated role/function in the retail hierarchy. Secondly, where a centre is failing, can investment in traditional town centre uses improve a centre's performance and attractiveness to investors, or is there a need to repurpose the role and function of that centre for alternative uses. This is particularly the case for medium sized centres, such as district centres where retail multiples are retreating as they focus on stronger and/or larger centres.

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[14] Net change relates to store openings versus store closures. Source: PWC and Local Data Company https://www.pwc.co.uk/who-we-are/regional-sites/south-east/insights/south-east-store-closures.html

3.65 The role of office, civic and community uses will become more important. Looking at office uses in particular, while demand for space in metropolitan centres will continue, there are opportunities for smaller centres (e.g. major and district centres) to provide affordable office space near transport hubs. Co-working office space, which provides flexible and generally more affordable desk space within a shared office environment, is a key growth area in the sector that can help utilise vacant space. Within the South East region, demand for office space, including co-working venues remains limited to regional or in the case of sub-regional centres, on sites that are located in close proximity to rail routes. There is expected to be greater demand for co-working space in locations that have a high population of commuters that travel to London. This is expected to be driven by companies seeking to reduce their office footprint in Central London in favour of promoting ad-hoc office provision in satellite locations within the commuter belt. Co-working office space also has the flexibility to adapt to social distancing requirements as when these requirements arise.

3.66 There is renewed interest in promoting new housing within town centres, which are now leading many mixed-use regeneration schemes. The concept of 'living over the shop' has long been promoted as way of utilising redundant upper floors in centres. However, the concept is more important than ever as the demand for new housing sites continues to grow. Promoting active uses on upper floors, particularly for residential, should come forward in local plan policy, particularly in respect to under-utilised or vacant upper floors. Changes to Permitted Development Rights (PDR) that came into force on 1st August 2020 will allow the redevelopment of vacant shop units for residential uses.

3.67 There is now a renewed focus on the development of 'air space' over existing low density commercial property. Foodstores are a prime example, with Tesco and Morrisons currently promoting residential development on upper floors to existing stores. In addition, there are many new schemes coming forward by Lidl and Aldi that incorporate residential development. The recent changes to PDR also allow for upward extensions of up to two additional storeys of flats on top of purpose-built detached blocks of flats. It will not be available where the existing building was not originally built and remains as a block of flats.

3.68 Promoting residential development within town centres has raised issues where the introduction of Permitted Development Rights for A1/A2 and B1 uses has led to a loss of retail and office space in town centres. This is a particular issue in locations where values for residential property outstrip those for retail and office space. Councils need to carefully monitor the impact of PDR in their centres to identify where the retail function and availability of affordable office space is at risk from PDR while allowing for increased residential living. Winchester has attempted to ring fence office space in Winchester by the implementation of Article 4 Directions.

3.69 Another key trend emerging is the investment by local authorities in town centres through the acquisition of commercial assets, such as shopping centres and parades of shops. In the past ten year over billion pounds has been spent on shopping acquisitions by local authorities in order to drive forward regeneration. The main benefit being that it allows a local authority to be more pro-active in control of town centre regeneration.

3.70 Furthermore, there is need for retailers and town centres to adapt to change by embracing online channels and responding to the power of social media. Traditional forms of bricks and mortar retailing is no longer enough as consumers become more demanding regarding the quality of in-store experiences as technological advances continue to make the online experience better.

3.71 As sub-regional centre, Winchester Town is likely to hold its position as a popular comparison goods shopping destination, due in part to the centre's historic and particularly attractive shopping environment, its affluent catchment, and also its popularity as a visitor destination. The centre's notably strong food and beverage offer shows that the centre is not reliant on retail to support day time trade, although it also serves as a potential vulnerability given the growing number of casualties in the casual dining market. However, as with the observations on the centre's retail market, Winchester Town's F&B market will invariably benefit from continued trade from significant number of visitors that come to the city annually. For Whiteley Shopping Centre, the centre is likely to be susceptible to competition from competing centres in Fareham and Southampton, the extent of which will become evident in the market share analysis in Section 4. For Winchester's District Centres and smaller centres, there is likely to be a need to reconsider the role of retail in these centres and whether there is potential to promote alternative commercial uses, particularly where there is evidence that traditional retail is failing.

SUMMARY

3.72 In summary, retailers and businesses in the UK's towns and high streets are facing a myriad of challenges. In many cases our traditional high street retailers are "*burdened*" with too many stores, unsuitable space and/or inflexible lease structures. This will either result in further retail "*casualties"* on the high street and/or inhibit any critical investment that may be needed to repurpose floorspace that is not "fit-for-purpose" and/or investment in the IT infrastructure and logistics capabilities need to key pace with pure online competitors.

3.73 These challenges and threats to the high street will continue to grow over the short, medium and long term. As for other centres across the UK, Winchester Town Centre and other centres in the District will need to embrace the new dynamics and trends, and build in resilience to adapt to future changes. This will be based, in part, on identifying and building on their unique attractions and competitive positioning where possible, and embracing the digital transformation of centres.

3.74 Traditional high street retailers will continue to face significant competition from online and out-of-centre shopping over the medium to long term. It is clear that our town centres and high streets are under pressure to simply retain retail businesses, let alone attract new investment and development. Tackling business rates and occupancy costs to create a more 'level playing field' with online and out-of-centre shopping will therefore be a key challenge at the national, regional and local level. If store closures continue to increase in centres alongside longer term vacancies, then this could "push" even more households to shop online (which a large of proportion of the population has been undertaking as a direct result of the COVID-19 pandemic), resulting in a "spiral of decline" that will be difficult to stop once started.

3.75 It is against this backdrop that public sector intervention will become increasingly important. Aside from their planning function, it is clear that local authorities will have to take a more proactive role in maintaining and enhancing the vitality and viability of town centres as landlords, developers, investors and managers. Recent Government-backed initiatives such as the Future High Streets Fund and the Town Deals Fund will provide almost £5bn of funding to be distributed to those local authorities that put together successful bids. This will help to kick-start some critical regeneration and infrastructure projects, and help grow local economies and create new jobs. A number of Councils are also taking a more proactive role in the regeneration of town centres through the purchase of property assets, including shopping centres. However, depending on the outcome of the Government consultation on the Public Works Loan Board the appetite for this may reduce but this may now be superseded by the need for the Government to provide funding and support to City and town centres as a direct result of the COVID-19 pandemic.

3.76 Against this backdrop, Winchester City Council will need to build in resilience and, where possible, *"future-proof"* its centres to the changes in shopping and leisure habits. This will inevitably result in a move away from high streets as solely retail-led locations to those that offer a wider range of retail, leisure, cultural, heritage, employment, tourist and other amenities/attractions. This transition to more diverse uses that go “beyond retail” will need to be supported by a mix of new homes and apartments on the edge of and/or ‘on top of’ centres to help boost their ‘captive’ resident and working catchment populations in the most sustainable and commercially effective way. This, in turn, will increase the attraction of centres, encourage more frequent trips and spend, and ultimately help to strengthen the overall vitality and viability of town centres as high quality places where people choose to live, work, shop, play and use for a wide range of activities.

3.77 The future trends and forecasts clearly point to the need for the consolidation, reduction and repurposing of physical retail space, rather than any significant expansion. Many high streets and smaller shopping centres will struggle to find the investment needed to survive. Retailers, local authorities, developers and landlords will therefore need to work together to develop sustainable visions and strategies that consider ways of reconfiguring and potentially redeveloping redundant space for alternative uses other than retail over the short, medium and long term.

3.78 Specific areas that the Council should seek to address through a town centre strategy or within emerging Local Plan policy include:

- Support and actively encourage the re-use of vacant upper floors to be turned into residential development that meets minimum Designated National Space Standards;
- Ensure that policies on town centres have room for flexibility in order to keep up with changes in trends, and build in resilience to adapt to future changes – this will mostly relate to revising the Primary Shopping Area and shopping frontages, which is discussed in Section 10.
- Support investment in digital infrastructure for the District’s town centres, but particularly Winchester Town
- Explore opportunities to create a town centre manager role within the Council that that encourages retailers and landlords to work together, and for Winchester Town, works with the Winchester Business Improvement District.

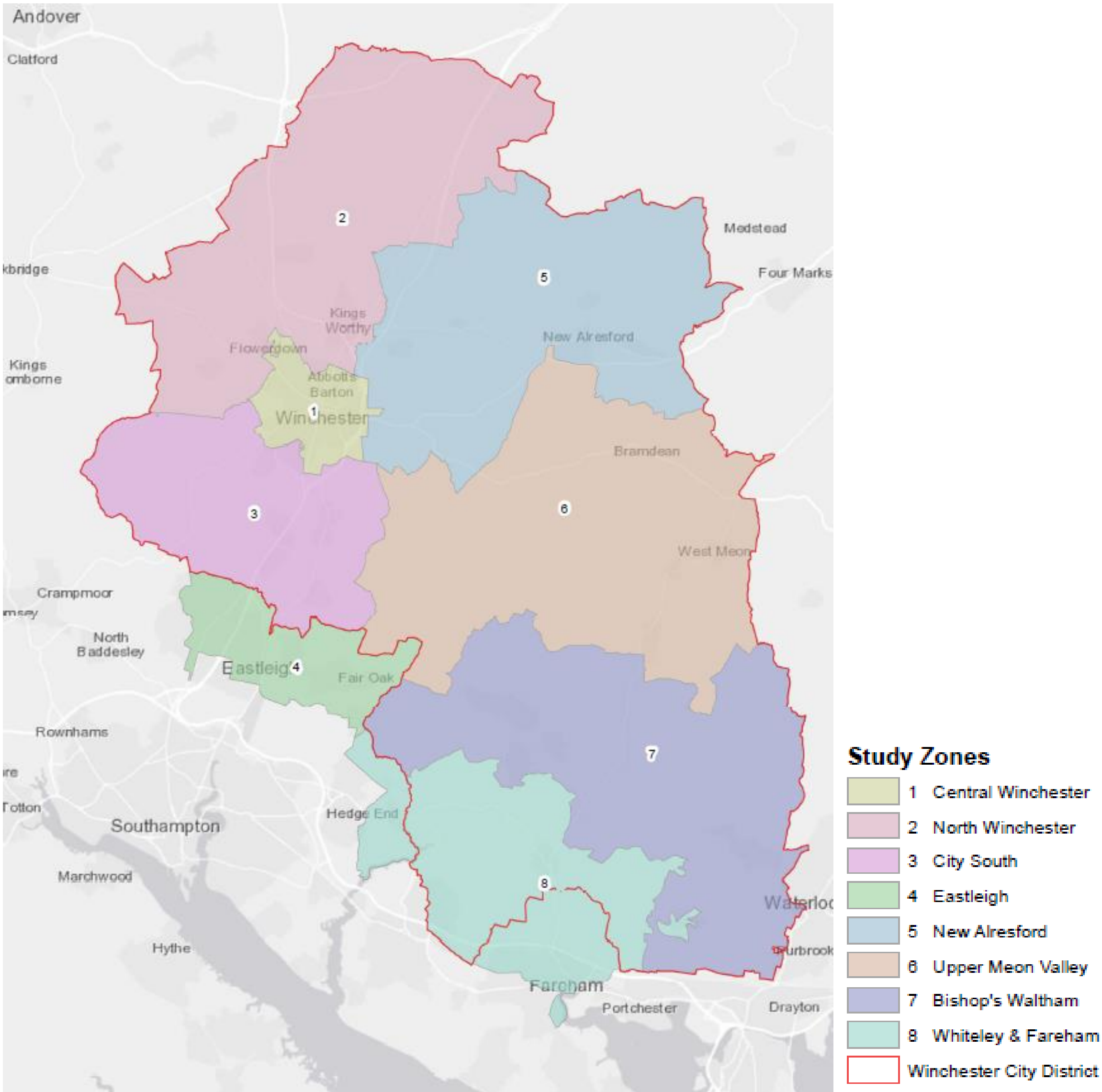
4. CATCHMENT AREA, SHOPPING PATTERNS AND COMPETING CENTRES

4.1 This section first defines the Catchment / Study Area that provides the basis for the quantitative and qualitative needs assessment. It then describes the household telephone interview survey (HTIS) and summarises the key headlines of the survey-derived market share analysis for convenience and comparison goods retailing.

STUDY AREA AND ZONES

4.2 The definition of an appropriate Study ('catchment') Area is an important starting point for any retail and town centre assessment. In this case, the Study Area (see Figure 4.1) has been defined using ward boundaries to form eight study zones. Of the eight zones, Zones 1 to 3 and 5 to 7 principally cover Winchester District. Zone 8 includes settlements around Fareham Town Centre, while Zone 4 sits within Eastleigh Borough; covering Eastleigh Town Centre and surrounding settlements.

Figure 4.1 Study Area and Zones



Source: Appendix A1

4.3 The study zones provide the sampling framework for the HTIS. This zone-by-zone approach also enables more detailed analysis of shopping patterns, market shares and expenditure flows both within and outside the Study Area for the purpose of the retail capacity assessment, in accordance with good practice.

Note on Study Area Boundaries for Historic Evidence Base

4.4 The study zone boundaries do not correspond to those used to inform previous retail evidence base documents, where the study areas were informed by postal sector-based zones. The decision to apply ward-based study zones for this study was made in order to provide a more accurate analysis of population projections for the District, particularly the use of projections based on future housing supply in Winchester.

HOUSEHOLD TELEPHONE INTERVIEW SURVEY (HTIS) & MARKET SHARE ANALYSIS

4.5 NEMS Market Research (NEMS) was commissioned to carry out a HTIS across the defined study area and zones (see Figure 1, Appendix A1). The interviews took place between 12th September and 21st September 2019. The questionnaire was designed by LSH in collaboration with the Council. The full 'weighted' survey results are set out in a separate volume to this study (Appendix B).

4.6 In total, some 1,000 interviews were conducted by NEMS; involving structured interviews by telephone with the person responsible for the main household shop. Responses across the Study Area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily population areas were not under or over represented in terms of the market share assessment.

4.7 The survey results help to identify broad patterns and preferences for different types of retail (convenience and comparison goods) shopping purchases and online shopping, as well as leisure use across the Study Area. The key findings are used to inform the baseline market share analysis and the centre/store turnover estimates that underpin both the quantitative and qualitative needs ('gap') assessment.

Convenience Goods – Market Share Analysis

4.8 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). The survey-derived market share (%) analysis for all convenience goods shopping is set out in Table 1 (Appendix A4). It should be noted that for this stage of the analysis the market shares for both convenience and comparison goods retailing include expenditure on 'Special Forms of Trading'[15] (SFT - including internet sales), but exclude 'null' responses in accordance with good practice.

4.9 The overall market shares have been derived from the analysis of the responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. In order to avoid the analysis of food shopping patterns being 'skewed' by larger superstores and food stores in the Study Area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified. The market shares for these different types of food shopping are set out in detail in Appendix A4.

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[15] Special Forms of Trading comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

4.10 The responses for 'primary' and 'secondary' food shopping purchase have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have applied a reasonable and robust weighting of 60% for main 'bulk' shopping; 10% for secondary main 'bulk' shopping; 20% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping.

4.11 Overall, food retailers in the District attract less than half (41.6%) of convenience expenditure in the Study Area. When Zone 4 (Eastleigh) is excluded from the Study Area, convenience expenditure retention increases to 55.6%, which is considered to be a low level of retention.

4.12 Online convenience shopping, which is largely represented by SFT market share, accounts for 7.5% of total study area expenditure. Respondents living in Zone 1 (Central Winchester) are most likely to make convenience purchases online, while those living in Zone 8 (Whiteley & Fareham) are less likely.

4.13 The table below summarises the key destinations for food shopping, based on total convenience goods purchases (i.e. main food and top-up).

Table 4.1: Distribution of convenience goods expenditure against total expenditure for the Study Area

Location	Study Area (Zones 1-8)	Study Area excluding Eastleigh (Zone 4)
Winchester Town	5.6%	7.8%
(Sainsbury's, Middle Brook Street)	(2.4%)	(3.4%)
Whiteley Town Centre	2.4%	3.0%
(Tesco Superstore, Whiteley Way)	(1.3%)	(1.9%)
Bishop's Waltham	3.4%	4.7%
New Alresford	2.0%	2.9%
Wickham	1.1%	1.6%
Smaller Centres (combined)	11.9%	16.7%
(Weeke Local Centre)	(7.9%)	(11.2%)
Out of Centre	15.2%	19.0%
(Sainsbury's Superstore, Badger Farm)	(7.3%)	(8.7%)
(Tesco Extra, Easton Lane)	(7.8%	(10.2%)
District Retention	41.6%	55.6%
Leakage to Centres Outside of the District	50.8%	37.1%
(Chandler's Ford)	(12.1%)	(3.6%)
(Eastleigh)	(6.5%)	(1.1%)
(Fareham)	(11.0%)	(15.3%)
(Hedge End Retail Park)	(6.4%)	(4.8%)
SFT/Online	7.5%	7.3%

Source: Table 1, Appendix A4. Note: Includes SFT/Online Sales

4.14 A further analysis of convenience shopping patterns presented in Table 1 (Appendix A4) found that:

- Retained expenditure in the District is largely supported by three foodstores: the most popular being Tesco Superstore, Easton Lane; followed by Sainsbury's Superstore, Badger Farm; and Sainsbury's Superstore in Winchester Town.
- Winchester Town serves a modest role in supporting convenience expenditure, where foodstores account for just 5.9% of total study area convenience expenditure.

- Whiteley Town Centre accounts for 2.4% of total study area convenience expenditure, which is mainly supported by the existing Lidl and Tesco stores.
- The District Centres of New Alresford, Bishop's Waltham, and Wickham together account for only 6.5% of study area convenience expenditure; reflecting the type of convenience provision offer, which is largely catered to top-up shopping.
- Weeke is performing well beyond its convenience shopping role as Local Centre, attracting 7.9% of study area convenience expenditure, which is predominantly supported by Aldi (4.3%) and Waitrose (3.3%).
- The District's network of other local centres and smaller centres together account for 4% of total study area expenditure, which is generated by smaller convenience stores serving day to day convenience shopping needs of the immediate resident population.

4.15 An analysis of expenditure by individual zone provides a more complete picture and shows that retention is higher for Zone 1 (Central Winchester), Zone 2 (North Winchester), and Zone 5 (New Alresford), where there is good access to foodstores. For those living in Zones 1 and 2, the majority of expenditure is directed to a smaller of key foodstores including Aldi and Waitrose in Weeke, Tesco Extra Easton Lane, and for Zone 1 only, Sainsbury's Superstore in Badger Farm.

4.16 For Zone 5, over a third (34.8%) of zonal expenditure is retained by convenience stores in New Alresford, including Tesco Express and Co-op, which largely support top-up shopping purchases. For main food shopping, residents from Zone 5 are more likely to travel to Tesco Extra Easton Lane where the store attracts 28.6% of total convenience expenditure for Zone 5.

4.17 Whilst food retailers in the District retain almost two thirds of expenditure (65.3%) from Zone 3 (City South), there is notable competition for expenditure from foodstores in Chandler's Ford (15.2%) and Eastleigh Town Centre (6.4%). This is to be expected given the proximity of these centres to settlements in Zone 2. Zones in more peripheral locations to Winchester Town, such as Zones 6 (Upper Meon Valley), 7 (Bishop's Waltham) and 8 (Whiteley & Fareham) retain a much lower market share.

4.18 For Zones 6 and 7 this is likely due to the lack of major foodstores and where it may be more convenience to travel to foodstores outside of the District than to access major foodstores in and around the city centre. Some 55.8% of respondents living in Zone 6 carry out food shopping within the District, particularly Tesco Extra on Easton Lane, Winchester. In terms of leaked expenditure from Zone 6, there is no single location that stands out as a competitor. Instead, expenditure diverted from Zone 6 appears to be lost to a broad number of centres outside the District, including Hedge End, Basingstoke, and Southampton.

4.19 Zone 8 includes Whiteley, but also Fareham Town Centre and its edge of centre foodstores. Therefore, only 17.2% of convenience goods expenditure from Zone 8 is retained by stores in Winchester District. The majority (61.8%) of expenditure from Zone 8 is drawn to foodstores in Fareham attracts 51.9%.

Comparison Goods – Market Share Analysis

4.20 Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods. The household survey comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest RPBN17, including: 'clothing and footwear'; recording media; electrical goods; books; furniture and carpets; DIY and garden products; medical goods; etc.

4.21 The results for all comparison goods, which include SFT[15], are set out in Tables 1 to 11 of Appendix A5 and are briefly described below. This includes a summary of market share retention for the District and leakage to online sales and competing centres is illustrated for each comparison goods category in Figure 4.1.

4.22 The market share analysis notes the following headline findings which analyse the distribution of expenditure within the Winchester's larger centres and competing centres outside of the District:

- Winchester District retains 23.8% of the comparison goods Study Area expenditure, increasing to 30.1% when Zone 4 (Eastleigh) is excluded from the Study area.
- The rate of expenditure retained in the District improves for particular goods, such as books/stationary, personal care products (cosmetics, medical goods, personal appliances, etc.), personal apparel/ gifts/etc., DIY and gardening products. Retention is particularly low for furniture, flooring and household textiles (7.7% of study expenditure for this category).
- Town, district, local and smaller centres in the District collectively attract 18.3% of total study area comparison goods expenditure, which is largely supported by Winchester Town. The town centre also accounts for the majority of retained expenditure for the different non-food categories that were analysed.
- Market share for Winchester Town is highest for its constituent zone (Zone 1/Central Winchester) and adjoining zones (Zones 2, 3 and 5). This follows a typical gravity pattern whereby shoppers choose centres that are closest to where they live, but subject to the centre meeting comparison goods needs.
- Out of centre comparison goods retailers account for 5.5% of total study area comparison goods expenditure.
- Whiteley Town Centre mainly draws expenditure from immediately surrounding zones (i.e. Zones 7/ Bishop's Waltham and Zone 8/ Whiteley & Fareham). Overall, the town centre attracts just 1.8% of total expenditure, increasing to 2.3% when Eastleigh is excluded from the study area.
- Winchester's district and smaller centres account for a much lower proportion of non-food expenditure which reflects the more limited non-food offer compared to higher order centres within the Study Area (i.e. Winchester Town, Fareham, and Eastleigh), and beyond.

4.23 In terms of competition, Southampton City and the surrounding out of centre retail destinations (including Hedge End) stand out as the main competing destination for comparison goods sales, together accounting for almost a quarter (23.9%) of all study area comparison goods expenditure. The city attracts a reasonably strong market share across most of the study zones, particularly from Zone 1/ Central Winchester where it accounts for 14% of Zone 1 comparison goods expenditure.

4.24 Eastleigh Town Centre and surrounding out of centre retailers attracts 8.4% of comparison goods expenditure from the Study Area. Market share falls to 2.5% when we exclude the Eastleigh zone (Zone 4) from the study area. Eastleigh's market share is mainly attributed to the leakage of expenditure generated from residents in Zone 2/ City South (includes Badger Farm, Oliver's Battery, and south to Twyford), which is to be expected given the proximity of Eastleigh to these settlements.

4.25 Fareham Town Centre and surrounding out of centre retailers account for 6.8% of all comparison goods expenditure from the Study Area. Market share is mainly generated from expenditure in Zone 8 (Fareham/ Whiteley), which covers Fareham Town Centre.

4.26 Waterlooville attracts 1.6% of comparison goods expenditure, which is mainly associated with expenditure drawn from Zone 7 (10%). This will reflect the close proximity of Waterlooville to Zone 7.

Portsmouth City and its out of centre retailers accounts for 1.3% of total study area comparison expenditure, which is generated by expenditure drawn from Zone 7 (2.9%) and Zone 8 (3.9%).

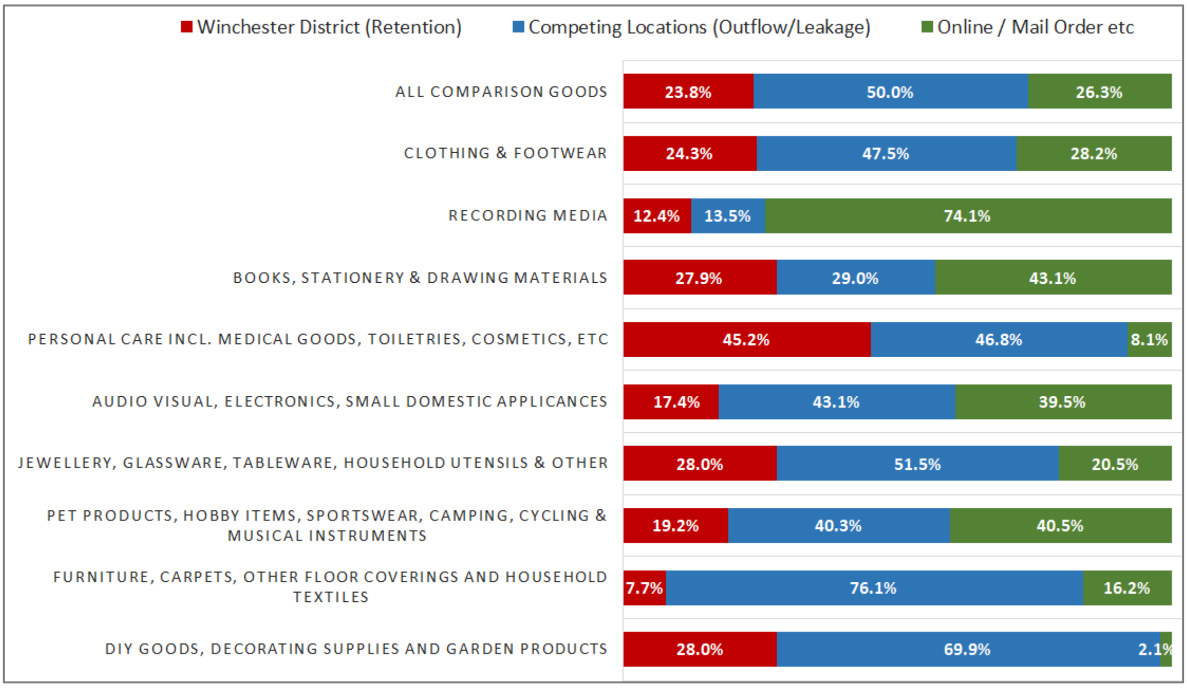
4.27 Retailers in Basingstoke, the closest main competing centre to the north of Winchester, have limited influence on shopping patterns in the District as a whole. Basingstoke and its surrounding retail locations account for only 1.6% of study area expenditure, mainly compete for expenditure from Zone 2 (8.4%) and Zone 5 (8.3%).

4.28 Online sales account for over a quarter (26.3%) of total comparison goods expenditure in the study area, which we consider to be particularly high. Residents in Zone 7/Bishop's Waltham spend the most on non-food online sales (30.7% of Zone 7 expenditure).

4.29 The popularity of online purchases is expected to increase, which will present challenges for town centres across the UK and Winchester is no exception. The market share analysis for the District shows a typical pattern for online shopping against the different comparison goods categories.

4.30 As Figure 4.1 shows, online accounts for a quarter or more of study area expenditure in five out of nine of the comparison goods categories that are assessed. Online sales are highest for recorded media sales where it accounts for almost three quarters (74.1%) of all purchases, which reflects the results of household surveys on shopper habits that LSH have identified for other local authorities in England. The only goods that are more likely to be purchased from 'bricks and mortar' stores relate to personal care goods and DIY and garden goods.

Figure 4.2 – Composition of Market Shares for All Study Area Comparison Goods Expenditure



Source: Tables 1-10, Appendix A5.

5. TOWN CENTRE ASSESSMENTS: WINCHESTER TOWN & WHITELEY

5.1 This section along with Section 6 assesses the performance of Winchester District's main centres, which will provide context to the market share assessment findings and the results of the quantitative assessment for new retail and leisure floorspace, and other town centre uses.

5.2 The town centre assessments consider the 'health' of Winchester Town, Whiteley and the district centres of Bishop's Waltham, New Alresford, and Wickham. The assessments are based on a review of a range of 'Key Performance Indicators' (KPIs) that are endorsed in the recently updated PPG. The assessment also considers other KPI's that we consider are particularly relevant to Winchester. The methodology for assessing KPIs is set out in Appendix A2.

5.3 The assessment considers of the health of the main centres within the District as set out in Policies DS1 of the Local Plan Part (LPP1) and DM7 of the Local Plan Part 2 (LPP2) , namely:

- Winchester Town;
- Whiteley
- Bishop's Waltham;
- New Alresford; and
- Wickham.

5.4 This section sets out the findings for Winchester Town and Whiteley Town Centre, with the findings for the district centres presented in Section 6.

5.5 The health of centres and how that may have changed over time is an important consideration in planning for their future and the Planning Practice Guidance (PPG) identifies a number of indicators which may be relevant (PPG Town Centres and Retail, Paragraph 006). However, it is also important to recognise that, as every centre is unique, understanding the role of each centre and how that may change in the future is potentially more informative than comparing any individual centre to a national average.

5.6 It is also the case for the smaller centres some of the nationally suggested indicators are less relevant, or in some cases either not available or are unreliable. Given the nature of the centres being studied therefore, this analysis concentrates on understanding what the centres currently offer (based on site visits) and how they are used and perceived by the local population (based on the household survey results).

WINCHESTER TOWN

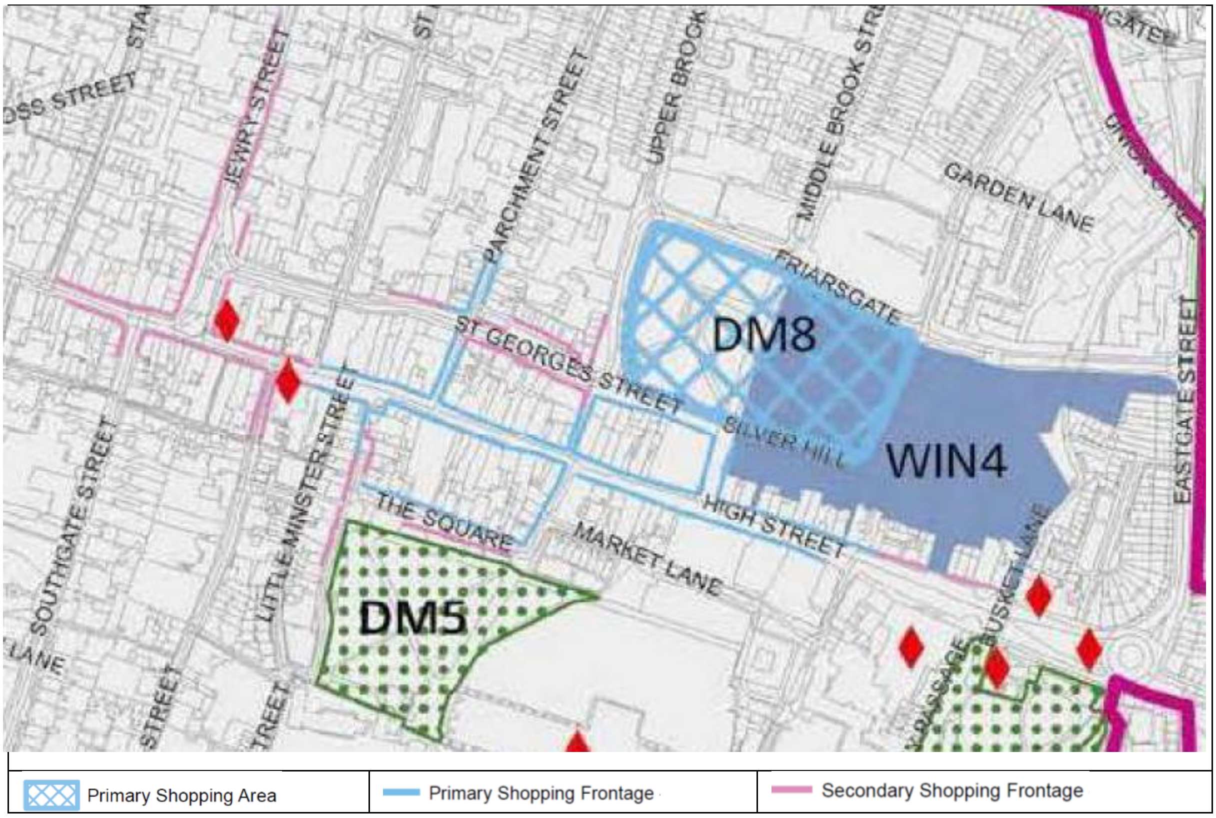
5.7 Winchester Town is the main retail and service centre for the District. It is also a historic centre which attracts tourists.

5.8 It is defined as a sub-regional town centre in Policy DS1 of the LPP1 and as such is the highest order centre in the District.

5.9 The defined city centre covers a relatively extensive area that extends to the north, south and west of the main retail area, which is itself centred on the High Street to the north of Winchester Cathedral.

5.10 Policies DM8 and DM9 of the LPP2 define Primary Shopping Frontages and Secondary Shopping Frontages within this central area and are plotted on the LPP2 Proposals Map for Winchester Town, an extract of which is shown in the figure below.

Figure 5.1: Primary and Secondary Shopping Frontages – Winchester Town



Source: LPP2 Proposals Map for Winchester Town (Map 26)

5.11 The Proposals Map appears to identify only a small area as the defined PSA. However, paragraph 6.3.16 of the LPP2 states that the primary and secondary shopping frontages combined form the Primary Shopping Area (PSA) (LPP2, Appendix A). On this basis, the PSA comprises:

- Properties on both sides of the High Street between Colebrook Street in the east to Staple Gardens in the west;
- The Brooks Shopping Centre;
- Properties between Middle Brook Street and Lower Brook Street (Friarsgate) including the King's Walk Shopping Arcade;
- The north side of the High Street between Cross Keys Passage and Busket Lane;
- Middlebrook Street between the High Street and Silver Hill;

- Market Street (west side) from The Square to St George's Street;
- Market Street (east side) from High Street to Silver Hill;
- Properties on St George's Street (north and south) between the junction with Silver Hill and Parchment Street;
- North side of St George's Hill between Parchment Street and St Peter's Street;
- Parchment Street between High Street and the residential areas;
- Jewry Street between High Street and just south of the junction with Albion Place;
- Properties on both sides of The Square;
- Great Minster Street; and
- Properties at the northern ends of Southgate Street and Trafalgar Street.

5.12 These areas provide different but complementary offers, with the main national multiple retailers concentrated along the High Street and in the Brooks Centre. The latter is a modern purpose-built shopping centre which provides retail units on two levels with parking below. The High Street contains a considerable range and age of properties, although many are historic.

5.13 The pedestrianised section of the High Street also hosts various street markets, which increases the representation of the independent retailers within the Primary area, as otherwise such uses tend to be located within the Secondary Frontage areas such as Parchment Street. In these areas the retail units are generally smaller although many are still within historic buildings.

5.14 Independent operators also occupy the majority of the smaller units in the newer build but secondary locations such as King's Walk and St George's Street.

5.15 The extensive food and beverage offer in the centre is also generally located away from the main pedestrianised High Street area, with larger units occupied by national multiples and smaller ones by café operators and independent businesses.

5.16 Business and leisure services include all the main bank operators who tend to occupy large, historic banking properties on the High Street. Other service providers such as estate agents are concentrated to the west of the centre along Jewry Street and Southgate Street.

5.17 The study considers the potential to review the PSA and shopping frontages within in Section 9 of this report.

Diversity of Uses

5.18 The city centre offer in Winchester is extremely varied, reflecting its size and draw. The main uses as assessed by Experian Goad in September 2018 are summarised in the table below, which provides a comparison of survey data from 2007. The Goad data is based on a slightly larger area than defined by the Council, including a small number of properties at the western end of the High Street, the northern part of Jewry Street and the eastern end of the High Street extending to the Bridge Street / Chesil Street junctions.

Table 5.1: Winchester Town - Current Retail and Service Offer (Units)

Type of Unit	2007			2018		
	No. of Units 2007	% of Total Units	2007 National Average %	No. of Units 2018	% of Total Units	2018 National Average %
A1 - Convenience	25	51.2%	46.4%	26	7.1%	9.2%
A1- Comparison	165	7.8%	9.1%	132	36.1%	29.6%
A1 - Retail Services	31	9.6%	8.0%	44	12.0%	15.0%
A2 Financial & Business Service	n/a	n/a	1.4%	41	11.2%	9.9%
A3 Restaurant /Cafes	42	13.0%	10.7%	50	13.7%	9.5%
A4 Bars	30	9.3%	13.9%	19	5.2%	4.5%
A5 Takeaways	22	n/a	n/a	12	3.3%	6.1%
D2/ SG Leisure*	n/a	n/a	n/a	13	3.6%	4.3%
Vacant	29	9.0%	10.5%	29	7.9%	11.7%
Total Units*	344	100%	100.0%	366	100%	100%

Table 5.2: Winchester Town - Current Retail and Service Offer (Floorspace)

Type of Unit	Floorspace by Category 2018	% of Total Floorspace	2018 National Average %
A1 - Convenience	3,948	5.6%	15.4%
A1- Comparison	27,945	39.6%	33.9%
A1 - Retail Services	3,679	5.2%	7.0%
A2 Financial & Business Service	6,847	9.7%	7.4%
A3 Restaurant /Cafes	9,653	13.7%	6.9%
A4 Bars	4,543	6.4%	5.7%
A5 Takeaways	1,561	2.2%	2.9%
D2/SG Leisure	7,999	11.3%	10.0%
Vacant	4,394	6.2%	10.3%
Total Units	70,569	100%	99%**

Source for Tables 5.1 and 5.2: 2007 (survey date – May 2007) (Table 5.1, RTCUS 2007); 2018 Experian Goad Category Report for Winchester Town Centre (survey date – 4th September 2018). UK averages for 2007 and 2018 are informed by Experian Goad.

Note: Survey boundary broadly reflects the town centre boundary identified in the Winchester Local Plan Part 2 Proposals Map

** Recordings for 'leisure' categories that fall within Class D2 and Sui Generis are not available from the 2007 survey data. Therefore, 'Total units' recorded for 2007 and 2008 are not comparable.*

*** Figure does not sum to 100% due to rounding.*

5.19 The latest Experian Goad data for 2018 indicates Winchester has an above average proportion of both A1 comparison units reflecting its higher order status and A3 units, which will serve both resident and tourist trade. In contrast retail service levels are slightly lower than average. It is noted that the number of A1 comparison goods retail units has fallen from 165 recorded in 2007 to 132 in 2018. The change reflects trends nationwide, largely due to the rationalisation of store portfolios driven by growth in online comparison retail shopping and so is not indicative of Winchester's retail performance.

5.20 When diversity of uses is looked at in terms of floorspace however, the retail service (Class A1 and certain sui generis uses such as hairdressers, beauty salons, travel agents, launderettes, opticians, etc.) offer performs better, occupying 5.2% of floorspace in the town centre area (i.e. identified by Experian Goad) compared with a national average of 7.0%. The space devoted to food and beverage uses (A3, A4 and A5) is also considerably higher at 22.1% (UK average 15.4%). This suggests those units in these uses are generally larger than seen elsewhere. In contrast convenience provision is considerably more limited, occupying just 5.6% of floorspace compared with a national average of 15.4%. This is as a result of there being no large foodstores within the central area.

5.21 The mix of retail uses in the centre reflects the strong comparison offer, with clothing retailers particularly well represented. In contrast health & beauty outlets are under-represented, potentially reflecting the greater use of more local centres for such purchases.

5.22 However, it has to be borne in mind that the actual retail offer is considerably greater than the Goad figures suggest, given the frequent and regular markets that operate in the High Street.

5.23 The city centre supports a number of popular leisure facilities including a boutique cinema (Everyman), two theatres (The Royal Winchester and Chesil Theatre), and a number of sports / leisure facilities; although the main Leisure Centre at River Park is outside of the city centre boundary (and currently being relocated to Bar End on the edge of the town).

5.24 A number of hotels are located in the city centre, including Hotel du Vin, which was the original and first hotel of this now very successful hotel chain. A new hotel in the form of a Travelodge opened in the centre in June 2019.

Vacancies

5.25 Based on the latest Experian Goad survey (September 2018), vacancy rates within Winchester are lower than the UK average at 8.2% of units compared with 11.7% nationally and 6.2% of floorspace (10.3% nationally).

5.26 A site visit has shown that these vacancies are distributed throughout the centre and in the adjoining areas covered by the Goad Plan. Where smaller units are becoming vacant, it would appear that the units are being re-let relatively quickly. This is evidenced by the swift relet of the former Jack Wills unit by Anthropologie, the premium high street retailer.

5.27 However, it would appear that the demand for larger units is less strong. There are a number of vacancies within the Brooks Centre despite its modern floorspace and on-site car parking. The retail units developed as part of the Travelodge scheme also remain unoccupied.

5.28 This is a potential concern as occupiers for such units are likely to be limited and a number of similar closures occur in the future as a result of company failures or rationalisation programmes, and as a result of the COVID-19 pandemic. Of particular concern would be Debenhams given their strategic and prominent position within the High Street and New Look and HMV within the Brooks Centre. Debenhams has recently announced that it is going into administration which could lead to the closure of their Winchester store.

5.29 The potential risks of Primark relocating from the Brooks Centre, should a sufficiently large unit become available elsewhere also need to be considered. Despite its location immediately to the rear of the High Street, the Centre itself does not appear to be trading well and pedestrian footfall seems low. Without the draw of Primark, the long term success of this centre in its current form must be questionable. The loss of Primark could impact on the desire for other retailers (e.g. TK Maxx) to continue their tenure within the shopping centre.

Retailer Representation, Demand & Requirements

5.30 Winchester has a good representation of national multiples, reflecting its sub-regional role. This includes 18 of Experian’s 31 major retailers, including Marks & Spencer and Debenhams. However, the units occupied by these major retailers are generally smaller than standard flagship stores.

5.31 Overall, the centre has slightly more multiple comparison retailers than the UK average, and an above average proportion of floorspace occupied by national multiples in the leisure sectors, reflecting its role as a tourist centre. However the proportion of national convenience multiples is significantly below average.

5.32 In addition, the centre also has a considerable number and range of independent businesses which add to the draw of the centre. These are primarily located away from the pedestrianised High Street, but this central area provides the venue for the regular markets increasing the overall attraction of the centre.

5.33 Overall, the city centre is represented by a reasonably good range of retail brands, which are predominantly aimed at the value and mid-retail market, and an older customer base. This is reflected in Javelin's VenueScore's assessment of the town centre where the centre is indexed against a number of variables, which are summarised in the table below.

Table 5.3: VenueScore Index for Winchester Town

	Index/ Classification	Index Range
Fashion Orientation Index	137	Degree to which the venue's offer is biased towards Fashion (High=Bias towards Fashion; Low=Bias away from Fashion)
Food Service Index	105	Degree to which offer is biased towards Food & Beverages (High=Bias towards Foodservice; Low=Bias away from Foodservice)
Tourist Orientation Index	171	Degree to which offer is biased towards retailers with a Tourist focus (High=Bias towards Tourist-focused retailers; Low=Bias away from Tourist-focused retailers)
Market Position Index	122 / Upper Middle	Degree to which the venue's offer has a Progressive or Traditional focus (High=Bias towards Progressive retailers; Low=Bias towards Traditional retailers) - where the venue's fashion offer meets a minimum threshold
Fashion Position Index	96 / Updated Classic	Degree to which the venue's offer has a Progressive or Traditional focus (High=Bias towards Progressive retailers; Low=Bias towards Traditional retailers)
Age Position	103 / Old	Degree to which offer is biased towards retailers with a Young or Old focus (High=Bias towards Older-focused retailers; Low=Bias towards Younger-focused retailers)

Source: Javelin VenueScore 2017

Note: The index base is represented by 100. An index figure that increases above 100 equates to an increasing or 'higher' bias towards the index classification, while a figure that decreases below 100 equates to a decreasing bias from the index classification.

5.34 The current representation and the centre's overall retail pitch will inevitably influence the type of other brands that will seek representation. The centre is well served by fashion brands, particularly premium 'high street' womens' clothing retailers and benefits from the presence of a department store (Debenhams). The centre caters less to fashion brands aimed at younger customers, a customer base that has increasing spending power and for which a future retail strategy for the city centre may benefit in targeting.

5.35 Demand for representation from retail and leisure operators is strong for Winchester Town, which is expected given the prevalence of high street brands in the centre and the affluence of the shopping catchment. Over a twelve month period to November 2019 a total of 17 operators published requirements for accommodation in Winchester Town with a combined floorspace requirement for approximately 10,000 sqm (gross). The table below lists out all identified requirements over the twelve month period:

Table 5.4: VenueScore Index for Winchester Town

Operator	Type	Use Class	Max Floorspace (sqm)
Menkind	Gadgets	A1	111
Blue Inc	Fashion	A1	232
Schmidt	Kitchen showroom	A1	465
Cats Protection (South)	Charity	A1	279
BoConcept	Furniture	A1	557
Brook Taverner	Mens' clothing/ tailoring	A1	139
Sit & Sip	Bottle shop and bar	A1 / A4	186
Metro Bank	Bank	A2	325
Miller & Carter	Restaurant	A3	557
Bosco Pizzeria	Restaurant	A3	279
Brunning & Price	Pub restaurants	A4	929
All Bar One	Public house/ restaurants	A4	279
Vintage Inns	Hotel/ public house	A4	372
Fullers Pub Brewery	Public house	A4	557
Buzz Gyms	Gym	D2	2,044
Bannatynes	Gym	D2	1,858
Snap Fitness	Gym	D2	929
Total Max. Floorspace Requirement			10,098

Source: The Requirements List

Notes: Requirements for in-centre locations recorded between October 2018 and November 2019

5.36 As the table shows, seven retailers were recorded as seeking representation in the centre; ranging menswear retailers (Blue Inc and Brook Taverner) to lifestyle/furniture retailers (BoConcept, The Shaker Kitchen Co).

5.37 Interest from food and beverage retailers is strong with 6 operators seeking to open outlets in the centre, the majority of which are either restaurants or pub/restaurants.

5.38 We understand that there is market demand from the fitness sector to locate in Winchester and that some of the town's gyms are considered over-subscribed, which highlights strong customer demand. Three gym operators including Buzz Gyms, Bannatynes and Snap Fitness have requirements for the town centre.

5.39 Given the strength of existing retail offer in the centre the extent of requirements for clothing and footwear brands appears to be limited. However, this is likely to reflect uncertainties in the wider UK market rather than local factors. In addition, national multiples are increasingly less likely to publish requirements as companies take a more cautionary position on expanding their portfolio. Feedback from retail agents operating in Winchester point to the centre being an attractive location for strong retail brands, as evidenced by the quick take up of voided units in the prime retail area (principally on High Street).

5.40 However, at this point in time and in light of the emerging impact of COVID-19, it will be difficult to predict how operator demand will play out in the town centre. With further retailers and leisure operators entering administration or ceasing trading entirely, there is likely to be a lull in demand for new space in Winchester in the short term.

Opening Hours and Evening Time Economy

5.41 As a major tourist centre Winchester has a good evening economy, offering a wide range of bars and restaurants. Much of the restaurant offer is centred on Jewry Street and lower High Street, which as a consequence are likely to be active areas in the evening time. The city centre also has a nightclub, Vodka, which we understand is popular amongst the student population.

5.42 A review of the opening hours of retailers on High Street indicates that most retailers close between the hours of 5pm or 6pm. The Brooks Shopping Centre is open until 6:30pm Monday to Saturday, closing at 5:30pm on Sundays. The only notable retailer that has later opening hours is Marks and Spencer who trade until 7pm on Mondays to Saturdays. As expected, the centre's two foodstores (Sainsbury's and Iceland) trade until 8pm on Mondays to Saturdays. There is unlikely to be demand from customers for late opening retail offer as late opening is typically in demand in metropolitan locations where competition is greater for retail expenditure and where demand for late opening often services custom from office workers.

5.43 In promoting the evening time economy for Winchester Town, there is potential opportunity to encourage shoppers and visitors to stay longer in centre, particularly on a Saturday through later shop opening hours and early evening events. This could include an early evening time food market on High Street and street events for young adults.

Barriers to Business

5.44 In the current economic climate, the main barriers to investment for new and existing businesses will predominantly relate to macro factors, such as uncertainty in the market generated from the Brexit process. This has led to many businesses putting expansion plans on hold and this applies equally to major brands as well as small businesses. Other macro factors such as rising operation costs (e.g. wages), increasing cost of goods, Coronavirus and business rates are key constraints to investment at local level, particularly for independents.

5.45 Winchester is a major draw for retailers and other town centre businesses and vacant units are limited. This, combined with the high number of historic premises in the city centre will limit the ability of new entrants to secure suitable premises as rents and fit-out costs are likely to be relatively high.

5.46 New retail businesses however will be assisted by the option of market trading and high footfall.

Pedestrian Flows

5.47 Information on pedestrian counts in the town centre was obtained from Winchester Business Improvement District[16]. Data for February 2020 (pre-COVID-19) recorded a total of footfall count of 112,613, averaging at 28,153 per week. This represents an increase of +9% from January 2020 and an increase of +12% on the foot count recorded for the previous year (i.e. February 2019). December 2019 recorded a higher foot count of 159,345 and a 24% increase from November 2019, which reflects an increase visits to the town centre in the run up to Christmas. The most recent counts for April 2020 show the impact of COVID-19 on pedestrian activity in the town centre, with 32,255 counts recorded, representing a reduction of 71% from February's total foot count.

5.48 Based on foot counts pre-COVID-19, the data confirms that Saturday is a particularly important day for town centre business, which attracts the highest foot counts compared to any other day of the

[16] Counts read from two sources: cameras, which count the number of people moving past the vision of a camera and mobile phone counters; and mobile phone counters, which pick up the number of mobile phones in a particular distance from a positioned sensor.

week. Interestingly, Sundays appear to be the quietest day based on the number of foot counts recorded.

5.49 A visual inspection of the town centre confirmed that pedestrian flows are greatest along the pedestrianised High Street. Flows are also strong on the routes that link the High Street to the main car parks and the Cathedral. Despite its proximity to both the High Street and the Brooks Shopping Centre, St Georges Street is considerably quieter, as are the side streets at the western end of the High Street.

Accessibility and Pedestrian Mobility

5.50 As a historic city serving a sub-regional role, Winchester benefits from good accessibility by road, and is the focus of bus services. The bus station is currently also well located at the eastern end of the High Street in the Central Winchester Regeneration Area, making it easy for those using the public services to reach the heart of the city centre. The Council operate a number of Park and Ride sites outside the city centre offering a total of 1,861 car parking spaces and accessed via a shuttle bus, which operates Monday to Saturday. The P&Rs were put in place to reduce traffic congestion and air pollution in the town centre.

5.51 Car parking in the town centre is supported by a number of multi-storey and surface car parks, which are dispersed across the town centre. A total of 17 car parks are identified, the largest being Chesil Street Multi-storey (616 spaces) and Tower Street car park (515 spaces). On street parking is also available. Parking charges typically cost around £2.80 for 2 hours of parking. It is noted that parking is free in the town centre on Sundays.

5.52 The road network also provides good access to the city centre for those travelling by car, although the high levels of traffic and resulting one-way and pedestrianisation schemes can make it difficult to negotiate. This is made worse by limited car parking provision and resulting queues for spaces that result, particularly in the PSA.

5.53 Within the Primary Shopping Area (PSA), provision for pedestrians is generally good, with the High Street pedestrianised for much of its route. To the east the pavements and wide road around The Broadway are generally pedestrian friendly, although ‘pinch points’ occur close to some of the bus stops. Elsewhere in the PSA the potential for pedestrian / vehicle conflicts is reduced by the one way systems that operate in many locations. However, in some streets where traffic flows are particularly high, such as the western end of the High Street, beyond Jewry Street and Southgate Street the amount of traffic noticeably impedes safe pedestrian movement.

5.54 Accessibility for people with mobility difficulties is likely to be impacted by the traffic in the area despite pavements and streets generally being designed to prioritise pedestrian movement. This includes restrictions resulting from the high volumes of pedestrian movement at key points along the High Street, such as in the vicinity of the Buttercross. Movement can also be restricted where cafés and restaurants use the existing pavement areas, such as along Great Minster Street and when the market stalls are trading.

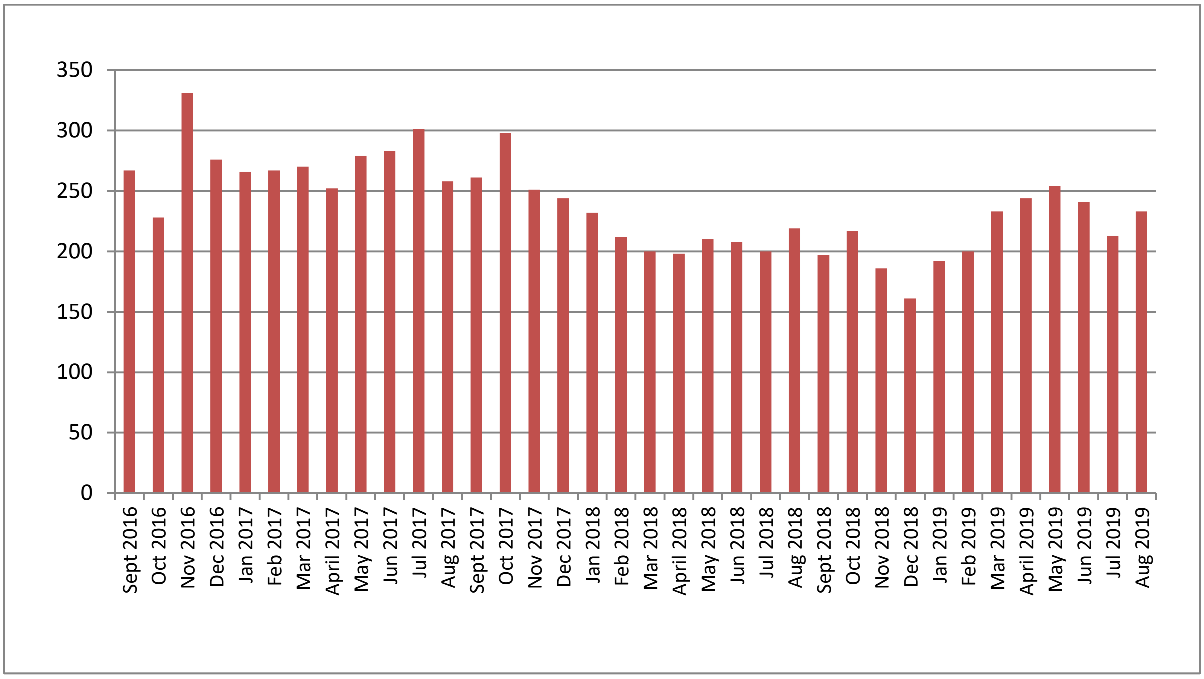
5.55 It was noted on the day of inspecting the town centre that there are areas within the centre where uneven surfaces result in localised flooding during heavy rain.

Crime and Safety

5.56 Winchester is a generally safe and secure city, with none of the respondents in the household survey suggesting that more / better security is required.

5.57 Incidences of crime reported to Hampshire Constabulary are recorded monthly with information on reported crimes dating back to August 2016. The figure below tracks recordings of crime in the Central Winchester electoral ward area on a monthly basis between September 2016 and August 2019.

Figure 5.2: Reported incidents of crime in Central Winchester - September 2016 to August 2019



Source: Home Office – Crime Map

5.58 The figures show that reports of crime have generally fallen since September 2016. For example, there were 2,571 reports of crime over the year to August 2019. By comparison, there were 2,733 reports of crime in the year to August 2019, and 3,278 in the year to August 2017. Whilst reports of crime occur across the city centre, it is noted that Upper Brook Street, The Brooks Shopping and the Sainsbury's store attract a disproportionately high number of reports, which mainly relate to shoplifting offences. Other parts of the town centre where reports of crime prevail include Jewry Street and The Square.

5.59 Crime and safety was not raised by respondents to the household or in-centre survey as an issue for Winchester Town.

Prime 'Zone A' Rents & Yields

5.60 The table below compares average rents achieved for prime retail areas (Zone A) at the end of 2019 in Winchester and against other sub-regional centres in the South East region, as well as higher order centres in the region. The table also presents average yields based on available data on sales transactions in prime retail areas at the end of 2019.

Table 5.5: Zone A Retail Rents and Yields – Sample of Centres in the South East Region

Centre	Centre Category	Prime Zone A Rents 2019 (£/sqft)	Rental Change 2017 to 2019 (% pa)	Zone A Yields 2019 (%)	Yield Change mid 2019 to end 2019 (% points)
Winchester	**Sub-regional**	**180**	**-2.7**	**5.5**	**0.5**
Chichester	Sub-regional	150	-7.4	6	0.75
Basingstoke	Sub-regional	125	-11.6	6.5	0
Portsmouth	Sub-regional	115	-4.1	8	1.5
Southampton	Regional	300	-7.4	6	0.5
Guildford	Regional	250	-10.9	5.5	0.5
Brighton	Regional	235	-3.0	5.5	0.25
Reading	Regional	225	-4.2	6	0.75

Source: Promis PMA

5.61 Looking at rental data first, by the end of 2019 Zone A rents in Winchester were in the region of £180 per sq/ft, which is higher than Chichester, a comparable centre in terms of its historic character and retail offer. Rents are also higher than Basingstoke and Portsmouth, but well below rents achieved in higher order centres in the region. In the two years to the end of 2019, values for Zone A rents have fallen in Winchester by approximately 2.7% per annum. This is lower than decline in other centres identified in the table above, which supports previous commentary that the town centre remains attractive to the market.

5.62 Data on yields indicate that transactions are achieving yields of 5.5%, which is particularly high for a sub-regional centre and is on par with yields achieved for Guildford and Brighton. Half year changes in yields suggest that yields achieved in Winchester have increased by half a percentage point. Lower yields correspond to a stronger return on investment. Therefore, the data presented on yields in the table above indicate that while yields have increased for Winchester, they are doing so at a slower rate than Chichester and Portsmouth, and on par with Southampton and Guildford.

Environmental Quality

5.63 Winchester Town is a very attractive and historic centre containing a range of significant buildings such as the Cathedral and Mill and many other very important historical assets, the oldest being around the High Street and the areas to the south.

5.64 In most cases these are well maintained and have been converted to meet the modern space requirements of retail and other businesses at ground floor level, although the many older features remain visible at upper levels.

5.65 Investment in the older properties within the Secondary Frontage areas is evident but some individual buildings, whilst of a high architectural standard would benefit from refurbishment.

5.66 More modern buildings, primarily to the north of the High Street and including the Brooks Centre are generally well maintained. Further, a few of these areas are looking run-down. This is especially true of the Friarsgate area and the King's Walk Shopping Arcade within it. This area lies within the proposed Central Winchester development.

5.67 The street furniture within the city centre is generally of a high quality and adds to the overall appeal of the centre. In places, such as Great Minster Street functional pieces have been given an attractive makeover, with bollards individually painted to promote local art galleries and exhibits.

Perception of Town Centre Users

5.68 An in-centre survey was carried out in Winchester Town Centre between 23rd October and 5th November 2019 involving 150 face-to-face interviews with members of the public. The in-centre survey asked a wide range of questions on how respondents used the town centre and where improvements could be made to encourage more visits and longer dwell times. The household telephone interview survey (HTIS) also asked specific questions on respondents' views and perceptions of Winchester Town as a place to shop and visit for a wide range of uses and attractions.

5.69 The complete response to questions on town centre user habits is provided in Appendices B and C. The following provides a summary of the key findings from the two surveys and in respect to the overall perception of Winchester Town.

5.70 Respondents to both surveys were asked what they liked most about the town centre, which resulted in varying responses against the two surveys. The answers most frequently raised (and ranked by the frequency of responses) are highlighted in the table below.

Table 5.6: What respondents 'like' about Winchester Town

Household Survey Responses (Study Area)	In-Centre Survey Responses
Attractive environment / nice place (34.8%)	Heritage and history (42.7%)
Good pubs, cafés or restaurants (13.5%)	Traditional (39.3%)
Nothing/ very little (12.3%)	Attractive environment/ nice place (34.7%)
Close to home (13.4%)	High quality shops (30.7%)
Traditional (10.5%)	Close to home (23.3%)
History (9.3%)	Safe and secure (21.3%)
Good range of non-food shops (8.8%)	Good facilities in general (20.7%)
Good range of independent / specialist shops (7.6%)	Good range of independent shops (10.0%)

Source: Answers to Q25 HTIS (Appendix B) and Q11 Winchester Town visitor survey (Appendix C)

5.71 As the table above shows, it is evident that the centre's attractive environment, history and traditional character are considered to be key attributes to respondents to the HTIS and in-centre survey. The centre's proximity to home was also an important factor for respondents to both surveys. For HTIS respondents, food and beverage offer and the centre's range of comparison retailers and independent shops were considered important. Those living closer to the centre and visiting more often like its proximity (31% of Zone 1 respondents) but consider its attractive environment to be a greater draw (40%), with its high quality shops (15%) and the street market (14%).

5.72 What is most notable is that the centre's food and beverage offer is more frequently highlighted by respondents to the HTIS than for retail. This adds weight to the current thinking on changing role of retail and leisure uses in centres, growing expenditure on dining and drinking out, and the increasing expectations that consumers have for food and beverage provision in centres.

5.73 Respondents to the in-centre survey highlight the good range of independent shops is also important alongside the presence of high quality shops. It is noted that respondents to the in-centre survey also perceive the city centre as safe and secure and offering a good range of facilities in general.

5.74 Further questions were put to respondents in the in-centre survey to understand how they perceive the quality and provision of specific town centre uses and facilities, including: availability of parking, parking charges, traffic congestion, public transport services, personal safety, range of shops and services, quality of shops and services, click and collect services/ pick up points, daytime entertainment / leisure facilities, evening entertainment and leisure facilities, town centre events, liveliness/ street life/ character, quality/ number of places to eat and drink out, general shopping environment, and the street markets. Respondents were instructed to rate each factor as 'very good', 'quite good', 'neither good nor poor', 'quite poor', or 'very poor'. The table below summarises the responses given to each answer.

Table 5.7: Perception of town centre facilities

	Very good	Quite good	Neither good nor poor	Quite Poor	Very Poor	Don't know
Availability of parking	0.7%	50.7%	10.7%	15.3%	1.3%	21.3%
Parking charges	0.0%	2.7%	31.3%	29.3%	16.0%	20.7%
Traffic congestion	0.0%	0.7%	13.3%	50.7%	32.7%	2.7%
Public transport services	8.0%	63.3%	12.7%	0.7%	0.0%	15.3%
Personal safety	70.0%	27.3%	2.7%	0.0%	0.0%	0.0%
Range of shops and services	68.0%	30.0%	1.3%	0.7%	0.0%	0.0%
Quality of shops and services	51.3%	46.7%	0.7%	0.0%	0.0%	1.3%
Click & collect services/ pick up points	18.0%	8.7%	2.0%	0.0%	0.0%	71.3%
Daytime entertainment/ leisure facilities	64.0%	34.7%	0.7%	0.0%	0.0%	0.7%
Evening entertainment and leisure facilities	49.3%	29.3%	1.3%	0.0%	0.0%	20.0%
Town centre events	67.3%	31.3%	0.7%	0.0%	0.0%	0.7%
Liveliness/ street life/ character	72.7%	27.3%	0.0%	0.0%	0.0%	0.0%
Quality/ number of places to eat and drink out	78.7%	20.7%	0.0%	0.0%	0.0%	0.7%
General shopping environment	76.0%	22.7%	1.3%	0.0%	0.0%	0.0%
Street markets	8.7%	35.3%	35.3%	10.7%	1.3%	8.7%

Source: Answers to Q12 In-Centre Survey (Appendix B)

5.75 The findings in the table above indicate very high levels of satisfaction for most of the town centre facilitates and attributes that were asked about. Satisfaction was not as strong as expected for the city centre's street markets with respondents more likely to rate the street markets as 'quite good' or 'neither good nor bad'. A similar range of responses was given by those living in Winchester District and from visitors and highlights a potential area of improvement for the town centre. The majority of respondents were unsure about how to rate click and collect facilities. Those who could answer the question were more likely to consider click and collect facilities as very good or quite good.

5.76 Respondents were more negative about parking availability, parking charges and traffic congestion. Negative responses to these factors were more likely to come from respondents living in the District than those visiting from beyond.

5.77 Both surveys asked what improvements could be made to Winchester Town that would encourage more visits for shopping and leisure purposes. The results are summarised for both surveys in the table below.

Table 5.8: Suggested improvements to encourage more shopping visits to Winchester Town

Household Survey Responses (Study Area)	In-Centre Survey Responses
Nothing (38.6%)	Nothing (30.7%)
More national multiple shops / High Street shops (17.2%)	More independent shops (25.3%)
More independent shops (17.1%)	More national shops/ high street shops (14.7%)
Free car parking (6.4%)	More/ better value or affordable shops (8.0%)
More / better non-food shops (4.0%)	Not as many cafes/ coffee shops (8.0%)
	More/ better food shops (4%)

Source: Answers to Q29 HTIS (Appendix B) and Q13 Winchester Centre City visitor survey (Appendix C)

5.78 The household survey found that many residents in the study area are satisfied with how Winchester Town serves their shopping and leisure needs with 38.6% suggesting that no improvements ('nothing') are need. This view was shared by respondents to the in-centre survey were no improvements was the most frequently highlighted response (30.7%). However, it is evident that the majority of respondents feel that improvements are needed. Where improvements were suggested, the household and in-centre survey raised very similar responses. The main improvements respondents to both surveys would like to see are more national multiples/ high street stores, more independent shops and more or better food shops. Respondents to the in-centre survey highlighted the need for more or better value or affordable shops, while for household survey respondents; the need for free parking was a more pertinent issue.

5.79 Respondents to the in-centre survey were specifically asked what improvements to the town's evening time offer (e.g. dining out, drinking out, evening leisure attractions, etc.) would encourage them to visit the centre more often. The survey found that over two thirds (68%) felt that no improvements would encourage them to visit the town centre more often in the evening time. Those that did offer suggestions, the most frequently raised suggestion was the provision of a multi-screen cinema (6.7%), followed by more or better entertainment options in general (5.3%), later opening bars/ pubs (4%), and more performing arts venues (4%), such as theatres, concert/music venues.

Winchester Business Improvement District

5.80 The Winchester Business Improvement District ('the BID') was established in April 2008 and was one of the first BIDs in the South East region. The BID is now in its third 5-year term which commenced in April 2018. Some 917 businesses contribute an annual levy that equates to 1.5% of the rateable value of their premises. The levy goes towards local improvements that are in addition to those that are already delivered by local statutory bodies. Over £5m[17] has been invested in Winchester Town, with focus on promoting Winchester as a cultural destination, improving public realm, creating a safer environment, and providing support and guidance to members.

5.81 A sample of the BID's key achievements since 2008 are set out below:

- Culture - Introduction of city-wide trails and involved in the 2017 Winchester Fashion Week programme
- Social media reach – audience of 2,700 people on Facebook.
- Media exposure – 2015 Christmas Lights Switch-on broadcast to 8 million viewers on the BBC1's The One Show; and advertising campaigns in collaboration with Destination Management Partnership (DMP) that have featured in major publications.
- Safety – funded three Police Community Support Officers and received awards in collaborations with partner agencies to reduce crime.
- Car Parking – set up a parking 'app' in 2016 to help users identify parking spaces in the town.
- Representation – represented and responded on behalf of members regarding major development and infrastructure proposals and plans, including the Station Approach and Central Winchester schemes, Local Plan Part 2, and other issues (car parking, Superfast broadband, Business Rates Revaluation, etc.).

5.82 The BID's strategy for the future will focus on the following themes:

(1) ***Positioning and promoting Winchester*** *– including continued collaboration with key partners (e.g. DMP, Visit Winchester and Visit Hampshire) on marketing, branding and promotional*

[17] Source: Winchester BID Business Plan 2018-2023

events, continue successful events, and setting up new funding support for independent businesses.

(2) ***Managing and enhancing the city scape** – including continued support of: the Winchester Business Crime Reduction Partnership: 'Shopwatch' and 'Pubwatch' programmes: the Diverted Giving Scheme; Air Quality Action Plan; Policy Community Support Officers; street pastors, and floral displays.*

(3) ***Supporting business growth** – including training for members, support for start-up businesses and access to workspace, continuing the Employee Wellbeing Scheme, networking events, and collaboration with official bodies on business continuity regarding potential incidents (e.g. flooding, snow and power loss).*

(4) ***Influencing and inspiring change** – continued involvement in influencing policy and strategies that affect, pedestrian footfall monitoring, and continuing the quarterly 'Business Barometer', the town centre parking and access app, and town centre audits.*

5.83 Discussions with Winchester BID regarding the town centre highlighted following key issues and opportunities:

- The important role of independent businesses, including retail, which help differentiate Winchester from its larger competitors (e.g. Southampton).
- A pressing need to provide more and better quality office space, which could support businesses that are seeking to expand but remain in Winchester. In addition, there is a need to support affordable office space, such as shared workspaces that would encourage and support start-up businesses and young entrepreneurs.
- Unlock hurdles associated with bringing forward regeneration schemes, particularly Central Winchester and Station Approach.

Summary

5.84 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Winchester Town below:

Table 5.9: SWOT Analysis Summary

Strengths	Weaknesses
Affluent catchment area. Established commercial and business centre. Attractive historic centre and high quality environment Established tourist industry. High quality retailers and food and beverage offer. Good mix of units in historic and modern premises. Good mix of national multiples and independent retailers. Established street markets. Low vacancy levels. Continued demand for space in smaller units. Central bus station and availability of park and ride. Successful Business Improvement District in place. Free parking in the centre on Sundays.	Traffic congestion. Continued pressure for parking within the PSA. Limited choice of larger footprint units. Narrow streets in places with 'pinch points' for pedestrians / those with mobility issues. Limited commercial leisure offer e.g. multiplex cinemas & Ten-pin bowling. Conservation and heritage building limit scope for development.

Opportunities	Threats
Investment in Central Winchester Regeneration Area Development of specialist offer in particular areas building on current provision, e.g. quality restaurants in Jewry Street. Development / promotion of market offer, including the opportunity for an early evening food market, which along with other later afternoon and early evening events could help to draw out dwell time of shoppers and visitors. Good residential provision / population in centre. Strong commercial offer in centre. Enhance Park and Ride capacity and operate the shuttle bus service on Sundays (subject to demand analysis).	Failure of key national multiples /rationalisation of store portfolios. Lack of new occupiers for key units within the centre. Withdrawal of further retailers from the Brooks Centre, particularly Primark. Competition from higher order centres such as Southampton. High /increasing business costs.

5.85 In summary, Winchester is a successful, healthy and viable centre that has many of the attributes that would normally lead to vitality and viability. At the present time it is clearly healthy and vacancies are low. However, there are indications that letting larger units that have been vacated may be proving difficult and the threat of further closures amongst the national multiples represented in the centre could result in prominent units being vacated. Any further closures / relocations from the Brooks Centre may also affect its trading performance.

WHITELEY

5.86 Whiteley is defined as a Town Centre in Policy DS1 of the LPP1, the only second tier centre within Winchester District's centre hierarchy. It is a purpose-built, modern development, which is designed to serve the new community at Whiteley and as such is very different in character and purpose than all the other centres in Winchester.

5.87 The centre itself is located just over 1km north of Junction 9 of the M27, to the east of the main residential areas developed to date, although further residential development to the north has commenced.

5.88 The defined centre comprises a purpose-built shopping centre, with the majority of units facing onto the central pedestrianised mall that forms the Primary Shopping Area (PSA). These units are primarily occupied by comparison retailers, with the convenience offer provided by a Tesco Extra unit to the north east of the mall and a leisure offer, including a cinema to the north-west. Additional food and beverage units face onto the eastern car park, with a leisure centre and smaller retail units to the west. Surface level car parking is provided in three areas, to the south, east and north of the centre

Diversity of Uses

5.89 The town centre offer in Whiteley is primarily retail and leisure orientated and all but one of the A1 retail units are occupied by national multiples. The majority of the retail service and the food & beverage operators are also operated by national chains.

5.90 The mix of uses is set out in the table below.

Table 5.10: Whiteley - Current Retail and Service Offer (Units)

	Number of Units	% of Total Units	National Average
A1 - Convenience	4	6.2%	9.7%
A1- Comparison	34	52.3%	31.1%
A1 - Retail Services	6	9.2%	15.7%
A3 - Restaurant /Cafes	16	24.6%	10.0%
A4 - Bars	0	0.0%	4.8%
A5 - Takeaways	0	0.0%	6.1%
A2 - Financial & Business Service	1	1.5%	10.4%
Vacant	4	6.2%	12.2%
Total	65	100.0%	100.0%

Source: LSH survey, October 2019

Note: Survey boundary reflects the defined town centre boundary for Whiteley in the Winchester Local Plan Part 2 Proposals Map.

5.91 Retail service and financial services are very poorly represented in the centre, and other uses are limited to the Cineworld cinema, Rock Up Climbing Centre and the Leisure Centre.

Retailer Representation, Demand & Requirements

5.92 The retail and leisure offer also differs from most other centres in Winchester, in that it nearly all occupiers are national multiples. All but one of the A1 retail units are occupied by national multiples. These include a considerable numbers of fashion retailers such as Marks & Spencer, Next, H&M, TopShop/TopMan, Monsoon, Fat Face, Clarks, Schuh, Seasalt, Joules, and River Island. Boots, JoJo Mama Bebe, Mamas & Papas, Flying Tiger, WH Smith, Sports Direct, JD Sports, Poundland, and Tesco are also represented.

5.93 The majority of the retail service and the food & beverage operators are also operated by national chains. The cinema is operated by Cineworld and the adjoining restaurant uses include Five Guys, Pizza Express and Nandos.

5.94 The shopping centre is ranked at 164 in the Trevor Wood 2019 Going Shopping. By comparison, the centre was ranked at 165 in the 2018 Going Shopping ranking.

5.95 The centre is positioned at 104 in the Javelin MallScore rankings of the UK's top 200 shopping centres and malls, sitting ahead of Terminal 5 Heathrow (105) and Livingston Designer Outlet Centre (106).

5.96 Retail and leisure operator representation is reflected in Javelin's MallScore's assessment of the centre, which are summarised in the table below:

Table 5.11: MallScore Index for Whiteley

	Index/ Classification	Index Range
Fashion Orientation Index	149	Degree to which the venue's offer is biased towards Fashion (High=Bias towards Fashion; Low=Bias away from Fashion)
Food Service Index	56	Degree to which offer is biased towards Food & Beverages (High=Bias towards Foodservice; Low=Bias away from Foodservice)
Tourist Orientation Index	101	Degree to which offer is biased towards retailers with a Tourist focus (High=Bias towards Tourist-focused retailers; Low=Bias away from Tourist-focused retailers)
Market Position Index	112/ Upper Middle	Degree to which the venue's offer has a Progressive or Traditional focus (High=Bias towards Progressive retailers; Low=Bias towards Traditional retailers) - where the venue's fashion offer meets a minimum threshold
Fashion Position Index	104 / Fashion Moderate	Degree to which the venue's offer has a Progressive or Traditional focus (High=Bias towards Progressive retailers; Low=Bias towards Traditional retailers)
Age Position	94 / Mid	Degree to which offer is biased towards retailers with a Young or Old focus (High=Bias towards Older-focused retailers; Low=Bias towards Younger-focused retailers)

Source: Javelin MallScore 2017

Note: The index base is represented by 100. An index figure that increases above 100 equates to an increasing or 'higher' bias towards the index classification, while a figure that decreases below 100 equates to a decreasing bias from the index classification.

5.97 Whiteley performs well as against Javelin's fashion index and compared to Winchester Town, reflects a broader market in terms of fashion pitch, albeit a much smaller retail offer. As the centre is in private ownership and is managed by a single property agent there are no published operator requirements. However, given the lack of vacancies and the strong retail brand offer there is likely to be interest from retailers seeking space in the shopping centre.

5.98 As highlighted previously in respect to Winchester Town, it will be difficult to predict operator demand once the COVID-19 pandemic subsides. The effective closure of the centre, with the exception of the foodstores will have considerable impact on the value of the site. It is possible that some of the retailers and F&B brands within the shopping centre may not reopen and the survival of many operators trading from Whiteley will be dependent on whether rent holidays or other subsidies are secured over the Government's lock down period.

Vacancies

5.99 Only one vacant unit is recorded in the PSA. However, this is due to be re-occupied soon by Seasalt. There are three other vacancies in the rest of the centre, the largest being the former Hancocks Diner unit facing the East car park. The other two include a small unit in The Square and a kiosk at the northern end of the Mall.

5.100 Overall therefore, vacancies are low and there appears to be on-going demand for retail space in the centre.

Opening Hours & Evening Time Economy

5.101 The shops in the main shopping mall have standardised trading hours with outlets closing at 7pm on most evenings. After that the longer trading hours of Tesco and the leisure and restaurant offer mean that activity continues into the evening, but to the north of the main shopping area.

5.102 The evening / night-time economy offer however is extremely restricted with the emphasis on the cinema and family dining. As a result beyond 11pm at night, the centre would be exceptionally quiet.

Barriers to Business

5.103 The nature of the retail and leisure floorspace provided in the centre means that the majority is unlikely to be suitable for many new businesses as the unit footprints are relatively large and thus would be expected to be expensive to commit to.

5.104 The main exception to this is around The Square and to the north on the approach to Tesco, where a small number of smaller units are provided. The former are mainly occupied by independent businesses, although Specsavers is also located here. The latter again houses national multiples.

5.105 The presence of Specsavers at The Square suggests that national multiples with smaller floorspace requirements may also be finding it difficult to find suitable space within the PSA and the lack of variety of space is likely to be a problem.

5.106 The size of the units however does make them potentially more versatile for emerging leisure uses that otherwise may struggle to find suitable premises within a town centre. The Rock-Up climbing centre is a good example of this.

Pedestrian Flows

5.107 The town centre is intended to serve the growing residential areas in Whiteley, but is primarily accessed by car. As a result key pedestrian flows are between the three main car parks and the Mall, with the majority of shoppers and visitors parking in the closest car park to their main destination.

5.108 The main north-south pedestrianised mall is well used during the trading hours as is the route to Cineworld and the restaurants during the evening. Footfall to and within the Square appeared to be considerably lower.

Accessibility and Pedestrian Mobility

5.109 As a centre that has been designed for use by people travelling by car, Whiteley town centre is well located on the local road network and provides a considerable number of car parking spaces.

5.110 It would appear from household survey responses however, that the number of spaces can be insufficient to meet demand at key times, a problem that may increase as the local population grows.

5.111 Access to the centre by public bus services is provided by two routes that serve the adjoining residential areas but access from the wider area is limited.

5.112 Within the centre, accessibility is good for all visitors with the main shopping mall being pedestrianised. Disabled parking is provided in the three car parks improving the ease of access for those with mobility problems and all units have level access.

Environmental Quality

5.113 The centre benefits from a good quality street scene and furniture with considerable public art and planting provided. The buildings are of a good quality and the two storey design of many of the units improves the overall appearance. However, the centre lacks the character seen in the neighbouring traditional and historic centres.

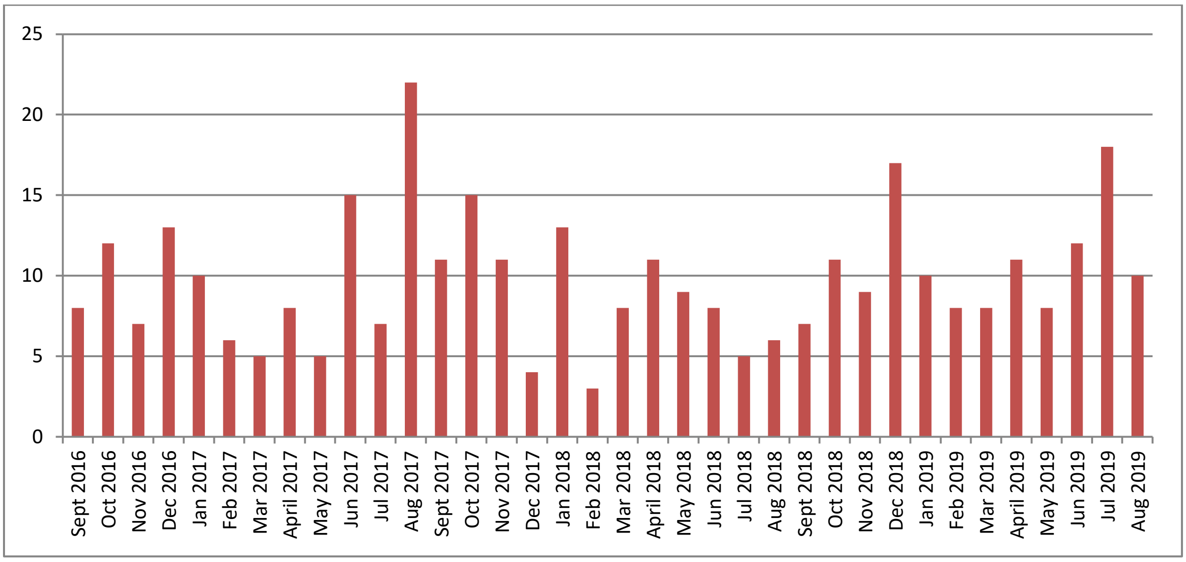
5.114 The shopping area and adjoining car parks are well maintained.

Crime and Safety

5.115 Whiteley is a generally safe and secure town centre, with none of the respondents in the household survey suggesting more / better security is required. This is likely to reflect the fact that safety and security would have been considered from the outset of the design work.

5.116 The figure below tracks recordings of crime in Whiteley, focusing around the covered shopping area and car park area, on a monthly basis between September 2016 and July 2019.

Figure 5.2: Reported incidents of crime in Whiteley - September 2016 to August 2016



Source: Home Office – Crime Map

5.117 The figures show that reports of crime have fluctuated over the past three years. Whilst reports of crime have dropped considerably for certain months in 2019 compared to previous years, on the whole, the total number of report crime recorded for the year to September 2019 (129) are higher than for 2018 (104) and 2017 (118). As expected, shoplifting offences account for the vast majority of reported crimes in Whiteley rose in the year to fallen since September 2016. For example, there were 2,571 reports of crime over the year to August 2019.

5.118 The centre benefits from CCTV and security staff, which is expected to provide a sense of safety to shoppers visiting the centre.

Customer Perception of the Town Centre

5.119 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Whiteley as a place to shop and visit for leisure purposes. The detailed responses for Whiteley are provided in the answers to Questions 28 and 29 in Appendix B.

5.120 Respondents were asked what they liked most about the town centre. The table below summarises the most frequent responses given by respondents living in the study area compared with those living in Zone 8, the constituent zone for Whiteley and surrounding residential communities.

Table 5.12: What respondents 'like' about Whiteley as place to shop and visit for leisure

Study Area Responses	Zone 8 Responses
Easy to park (23%)	Close to home (11.1%)
Good range of shops (20.8%)	Good range of non-food shops (17.9%)
Nothing/ very little (15.2%)	Nothing/ very little (15.7%)
Free car parking (10.6%)	Easy to park (13.7%)
Close to home (10.5%)	Free parking (10.7%)
Good pubs, cafes or restaurants (9.7%)	Good range of 'high street' retailers/ multiples (8.9%)
Good range of 'high street' retailers/ multiples (9.2%)	Good pubs, cafes or restaurants (8.1%)

Source: Answers to Q28 HTIS (Appendix B)

5.121 The table above shows that those living in the local area and those living in the wider study area broadly share the same reasons why they 'like' Whiteley as a place to shop and visit for leisure purposes. Respondents from Zone 8 like most that Whiteley is close to home, while those living in the study area as a whole 'like' that the centre is 'easy to park' in. These responses are expected given the geographical relationship to both sets of respondents.

5.122 The centre's good range of shops and non-food shops is the second most 'liked' aspect of Whiteley provided by respondents from the study area and Zone 8, respectively. Respondents also shared positive views on parking, as well as the 'good' range of high street retailers, places to eat and drink out.

5.123 Respondents were asked what improvements would encourage them to visit Whiteley more often. The most frequently suggested improvements cited by respondents in the study area and Zone 8 are summarised in the table below.

Table 5.13: Suggested improvements to encourage more shopping visits to Whiteley

Study Area Responses	Zone 8 Responses
Nothing (61.5%)	Nothing (54.4%)
Don't know (16.1%)	Reduce traffic congestion (7.8%)
More 'high street' retailers/ multiples (4.2%)	More shops indoors/ undercover (7.4%)
More independent/ specialist shops (3.7%)	More 'high street' retailers/ multiples (6.8%)
Reduce traffic congestion (3.0%)	Better access by road (6.2%)
Better access by road (3.0%)	More independent/ specialist shops (3.8%)
More/ better parking (2.7%)	More/ better places for eating out (3.7%)

Source: Answers to Q29 HTIS (Appendix B)

5.124 The results indicate that respondents are generally satisfied with how the centre meets their shopping and leisure needs based on the frequency responses stating that no improvements are needed. Where suggested improvements are given, the need to reduce traffic congestion and provide better access to the centre by road was highlighted by respondents living in both the study area and Zone 8. Other common suggestions included the need for more 'high street' retailers/ multiples, but also more independent/ specialist shops. For those living more locally (Zone 8), more covered shops and more/ better places for eating out was highlighted.

Lambert Smith Hampton

Summary

5.125 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Whiteley Town Centre below:

Table 5.14: SWOT Analysis Summary

Strengths	Weaknesses
Good range of national multiples. Anchor foodstore helps to drive footfall and linked trips. Extensive family friendly F&B offer. Low levels of vacancies. Availability of dedicated surface car parking. Attractive pedestrianised area. Presence of a multi-screen cinema which underpins the evening time economy.	Lack of retail and financial services. Lack of independent / specialist retailers and businesses. Reliance on fashion national multiples and family-orientated F&B offer. Evening time economy restricted by centre opening hours. Lack of character / unique offer compared to traditional town centres.
Opportunities	**Threats**
Growing local population and associated expenditure. Potential to reconfigure retail units to respond to retailer requirements. Potential opportunities to expand the centre and for airspace development. Good pedestrianised areas and open space offering opportunities for events.	Reliance of national multiples to anchor the centre. Reliance on A1 retail and F&B uses. Car parking becoming insufficient. Continued growth of online shopping. Competition from Fareham and Hedge End.

5.126 In summary, Whiteley is a healthy and successful purpose-built town centre that is fulfilling its main function of meeting the shopping and leisure needs of the developing Whiteley community. However, the style of development and size of units means it appeals primarily to the national multiple chains, and closures as a result of company failures or rationalisations poses a significant risk. This could be amplified by any potential impact arising from the extended ‘lockdown’ from COVID-19.

5.127 There is also a question as to whether the centre is meeting the needs of the local community in terms of providing a comprehensive range of town centre uses, particularly in respect to retail service, and financial and business services.

5.128 A long term vision will be needed that considers new investment for the centre to ensure it meets the evolving requirements of the centres existing retail and leisure brands, and also the potential to attract new brands. Investment is also necessary to ensure that the centre can compete with destinations beyond the District that cater to a similar customer base, such as Hedge End in Southampton.

6. TOWN CENTRE ASESSMENTS: DISTRICT CENTRES

6.1 This section sets out the findings of the health check assessments for the district centres of Bishop's Waltham, New Alresford, and Wickham.

BISHOP'S WALTHAM

6.2 Bishop's Waltham is located to the south of Winchester District on the southern edge of the South Downs. It is approximately 10 miles (as the crow flies) from the centres of Winchester and Southampton, with Portsmouth slightly further away. It is defined as a 'District Centre' in Policy DS1 of the LPP1.

6.3 The town centre covers a roughly square area to the east of the junction of the B3035 and the B2177, immediately north of the historic Bishop's Waltham Palace. Within this, the Primary Shopping Area (PSA) is defined by the Primary Shopping Frontage. This comprises the majority of properties along High Street, Cross Street and the north-western part of Brook Street.

6.4 There are other retail and town centre uses in the adjoining streets, particularly around St George's Square and at Merlin Mews to the east of Houchin Street, where space is provide in a more modern development. The main foodstore provision in the form of a standalone Budgens store is also located on the western side of the centre.

6.5 The rest of the town centre area includes two surface car parks, a range of other businesses and services and residential development.

Diversity of Uses

6.6 The retail and town centre offer is provided in a range of outlets, with the majority being operated by independent retailers and businesses from smaller units in historic buildings. The main exception to this is the Budgens store which is located in a larger, free-standing unit on the edge of the town centre, which benefits from on-site parking. There is also a more modern parade of units at Merlin Mews, immediately to the south of the main town centre car park.

6.7 The mix of retail and service uses is summarised in the table below, which is based on the main use provided in each outlet.

Table 6.1: Bishop's Waltham - Current Retail and Service Offer (Units)

	Number of Units	% of Total Units	National Average
A1 - Convenience	9	12.0%	9.7%
A1- Comparison	20	26.7%	31.1%
A1 - Retail Services	17	22.7%	15.7%
A3 - Restaurant /Cafes	6	8.0%	10.0%
A4 - Bars	1	1.3%	4.8%
A5 - Takeaways	3	4.0%	6.1%
A2 - Financial & Business Service	15	20.0%	10.4%
Vacant	4	5.3%	12.2%
Total	75	100.0%	100.0%

Source: LSH survey, October 2019

Note: Survey boundary reflects the defined town centre boundary for Bishop's Waltham in the Winchester Local Plan Part 2 Proposals Map.

6.8 The centre has an above average representation of convenience outlets (12%) as a total of all units compared to the national average (9.7%) identified by Experian Goad. Comparison good provision stands 26.7% of all town centre units, below the national average (31.1%), but is reflective of town centres of this size where the role of comparison goods retail has reduced.

6.9 Many of the town centre units provide other types of retail goods / services as an ancillary offer. This is likely to be a response to the more difficult trading environment town centre occupiers are now facing and demonstrates the advantages smaller businesses can have over the larger chains whose offer is often centrally controlled. It also has the benefit of allowing businesses to widen the overall range of goods sold in the centre, as products that may be purchased less regularly can be offered, even though sales would be insufficient to support an outlet dedicated to such products. It also adds to the customer interest in the centre.

6.10 This makes it more difficult to accurately reflect the range of goods and services that may be available to customers in the centre and differences between the local mix and that seen nationally need to be treated with a degree of caution.

6.11 Nonetheless, it is clear that Bishop's Waltham has a particularly strong service offer with both retail services and financial and business services well-represented compared with the UK average[18].

6.12 In addition the town centre includes a doctor's surgery, a dental surgery, a Citizen's Advice office, the Bishop's Waltham Social Club, an IT / Computer Services outlet and a betting office.

Retailer Representation, Demand & Requirements

6.13 National multiples are limited to the Co-op foodstore, Boots, the Post Office and Costa Coffee in the PSA, and two banks (Barclays and Lloyds), a Budgen's supermarket, Betfred and the Co-op Funeral Services in the rest of the town centre. This represents just 12% of all town centre units.

6.14 Two retailer requirements are published for Bishop's Waltham including from Holland & Barrett and the Age UK (charity shop). Both operators are seeking retail accommodation of up to 650 sqm gross.

6.15 Requirements are likely to be affected by the current COVID-19 pandemic. It is expected that there will be no demand from operators seeking space in smaller centres, such as Bishop's Waltham. It will remain to be seen whether brands such as Holland & Barrett will be seeking new store openings in the short term post-COVID-19.

Opening Hours & Evening Economy

6.16 The predominantly independent retailers generally have restricted opening hours with most retailers trading until 5pm. The centre's two supermarkets, Co-op and Budgen's are the only late opening retailers; trading on Mondays to Saturdays until 10pm and 11pm, respectively. There are also a good number of restaurants in the town adding to activity during the evenings, although these are relatively dispersed.

Vacancies

6.17 The proportion of vacant units in the town centre is considerably lower than the UK average at just 5.3%, with just 2 vacancies in the PSA and 2 in the wider town centre. Further, one of the two units in the PSA is in the process of being fitted out for occupation by an existing retailer in the town. However, it is not known if this will be as an expansion or re-location of the existing business.

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[18] Adjusted Experian Goad average

6.18 The two vacancies in the wider town centre comprise the unit in St George's Square previously occupied by Austin & Wyatt Estate Agents and the former petrol station adjacent to Budgen's. The former is undergoing external refurbishment at present, but there is no indication that the unit has been re-let. The latter represents a very visible development opportunity on the approach to the town centre, albeit one that visually and physically lacks an obvious link.

Barriers to Business

6.19 The centre offers limited options for new businesses wanting to open in the centre, or for existing businesses to expand. One Barbers outlet is already trading from two units in very close proximity and another retailer is to open shortly in one of the vacant units as highlighted before, although it is not clear if this is a relocation from another unit or an additional trading unit.

6.20 The potential to expand the centre through the development of the former petrol station site and / or sites in the vicinity of Malt Lane exists, but requires major new development. A site at Abbey Mill, Station Road had a historic planning consent for a Sainsbury's supermarket which was not implemented.

Commercial Rents and Yields

6.21 Reliable information on rents and yields is not available due to the limited size of the centre and number of transactions.

Environmental Quality

6.22 Both the built form and streetscape are generally of a high quality within the PSA and immediately adjoining streets, although through traffic and street parking does detract from this.

6.23 The majority of buildings are historic with a range of building materials and styles evident. Newer, infill development is also of a high design quality and in keeping with its setting. Buildings are generally well maintained.

6.24 The street furniture in the PSA is also of a good quality and pavements are well maintained. Planting is limited by the narrowness of many of the streets but is provided in a number of locations where space permits.

6.25 Outside of the PSA, the area fronting the B2177 includes areas of attractive planting and wide pedestrian pathways. However, the existing properties are unattractive and some are in poor condition which detracts from the views on the approach.

Pedestrian Flows

6.26 The compact nature of the PSA and location of the two car parks means pedestrian flows throughout the central part of the town centre are good. However, footfall decreases sharply away from these areas, for instance around St Georges Square and Bank Street. Pedestrian linkage between the Budgen's store and the rest of the centre appears to be limited.

Accessibility and Pedestrian Mobility

6.27 The nature of the town and the competition from larger centres nearby means that the public bus services serving Bishop's Waltham are more likely to provide opportunities for residents to travel to other shopping destinations, than to bring shoppers to the town. As a result, residents in Bishop's Waltham but living to the north of the B3035 rely on walking or driving to access the town centre services.

6.28 Car parking is provided in two main car parks within the town centre at Basingwell Street and Lower Lane. Both provide easy access to the PSA, but appear to be insufficient to meet demand at busy times. Surface car parking is also provided at the Budgen's store for its customers.

6.29 Some on-street parking is permitted along Houchin Street, but the number of spaces within the PSA and the immediately adjoining streets are limited by the narrow, historic road network.

6.30 Accessibility for pedestrians within the centre is generally good, with widened pavements and pedestrian-only links provided where possible within the historic core. There are also good pedestrian routes to the centre from the rest of the town centre. However, pedestrian access from the residential areas to the north / west is restricted by the main highway network.

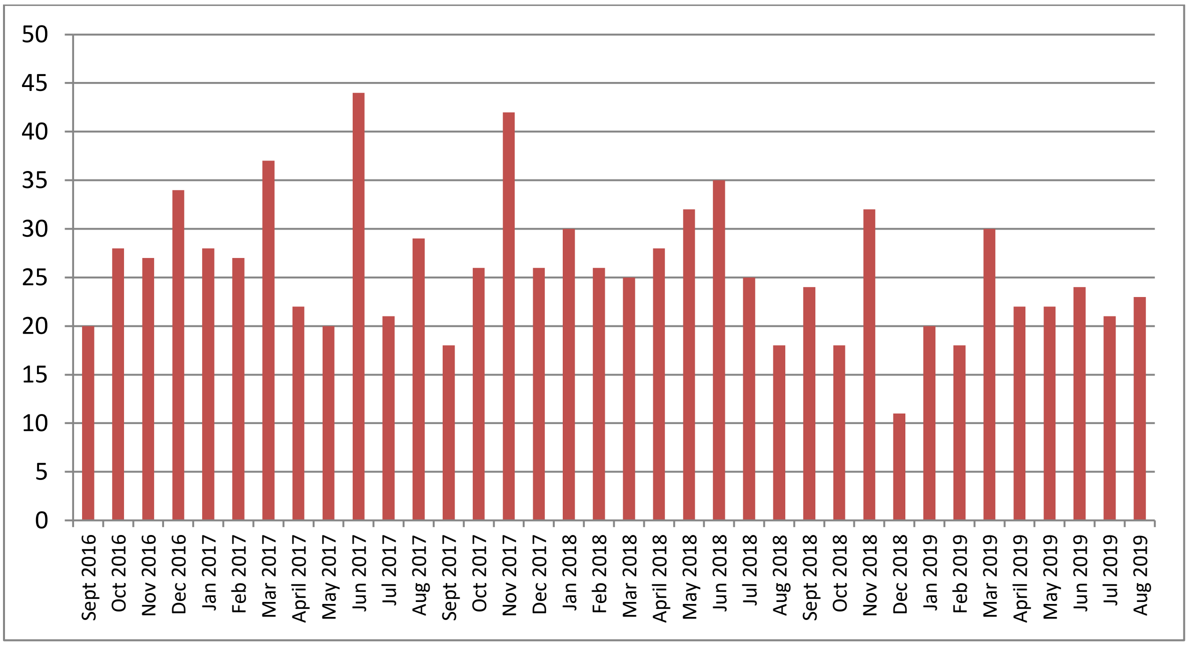
6.31 Accessibility for pedestrians within the centre is generally good, with widened pavements and pedestrian-only links provided where possible within the historic core. There are also good pedestrian routes to the centre from the rest of the town centre. However, pedestrian access from the residential areas to the north / west is restricted by the main highway network and people with mobility issues are likely to find it difficult to access all parts of the PSA due to a number of locations where pavements narrow considerably, the lack of crossing points with dropped kerbs and the relatively high volumes of traffic.

Safety and Occurrence of Crime

6.32 Bishop's Waltham is a generally safe and secure town centre, with four respondents to the household survey indicating they like it because it feels safe and secure and no-one suggesting more / better security is required.

6.33 The figure below tracks recordings of crime in Bishop's Waltham on a monthly basis between September 2016 and July 2019.

Figure 6.1: Reported incidents of crime in Bishop's Waltham - September 2016 to August 2016



Source: Home Office – Crime Map

6.34 The figures show that reports of crime have fallen annually over the past three years from 337 in August 2017 to 265 in August 2019. There are no notable areas where reports of crime are concentrated with reports dispersed across residential and urban areas. Within the town centre incidences of crime are relatively low. For example, in August 2019 only one incidence of crime was reported, which related to a violent or sexual offence. A review of crimes in other months/ years shows that the type of crimes in the town centre range such as shoplifting, public order offences, and anti-social behaviour.

Customer Perception of Town Centre

6.35 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Bishops Waltham as a place to shop and visit for leisure purposes. The detailed responses for Bishops Waltham are provided in the answers to Questions 34 and 35 in Appendix B.

6.36 The household survey indicates that the centre is well used by those living nearby (Zone 7/ Bishop's Waltham) with nearly 60% of respondents indicating they visit at least once a week. Of the remainder 23% indicate they never visit. This is likely to be the result of the extent of the survey zone which extends some distance to the east, towards Waterlooville.

6.37 Visits to the centre from the wider area are unsurprisingly less frequent, but 30-40% of respondents from Zones 3, 4 6 and 8 indicate they visit the town on an occasional basis. This normally means a few visits a year but around 15% of people in Zone 6 visit at least once a week.

6.38 Respondents were asked what they liked most about the town centre. The table below summarises the most frequent responses given by respondents living in the study area compared with those living in Zone 7, the constituent zone for Bishop's Waltham and surrounding residential communities.

Table 6.2: What respondents 'like' about Bishop's Waltham

Study Area Responses	Zone 7 Responses
Attractive environment (29.6%)	Close to home (29.6%)
Good range of independent shops (22.1%)	Attractive environment (24.1%)
Close to home (16.4%)	Good range of independent shops (14.3%)
Good pubs, cafes or restaurants (15.5%)	Friendly atmosphere/ environment (9.7%)
Nothing/ very little (10.8%)	Nothing/ very little (9.2%)
Traditional (8.9%)	Good range of non-food shops (9.1%)
Good range of non-food shops (6.8%)	Good pubs, cafes or restaurants (9.0%)

Source: Answers to Q34 HTIS (Appendix B)

6.39 The household survey indicates that Bishop's Waltham is generally liked by residents and those visiting from further afield, with its attractive environment particularly appreciated by 24.1% of local residents and 29.6% of respondents from the study area as a whole.

6.40 The range of independent shops and traditional feel of the centre makes it popular with those visiting from outside of Zone 7. These factors are also highlighted by local residents as a key attributes for the centre, although the town centre's proximity to home was the most frequently cited reason why they 'like' the centre.

6.41 The other key draw of the centre is the good food and beverage offer which is mentioned by 15.5% of all study area respondents, which was also cited by 9% of respondents from Zone 7.

6.42 Respondents were asked what improvements would encourage them to visit Bishop's Waltham more often. The most frequently suggested improvements cited by respondents in the study area and Zone 7 are summarised in the table below.

Table 6.3 – Suggested improvements to encourage more shopping visits to Bishop's Waltham

Study Area Responses	Zone 7 Responses
Nothing (63.0%)	Nothing (60.2%)
Don't know (22.4%)	More/ better parking (14.5%)
More/ better parking (5.6%)	More/ better food shops (4.8%)
More independent shops (2.9%)	More / better pedestrianized street (3.2%)
More 'high street' retailers/ multiples (2.1%)	Repair/ resurface pavements (3.1%)
More/ better comparison retailers (1.6%)	Fewer coffee shops/ cafes (2.3%)
More/ better food shops (1.0%)	Better public transport (1.0%)

Source: Answers to Q35 HTIS (Appendix B)

6.43 There are very few things respondents dislike about the centre, although 15% of local respondents (Zone 7) would like to see more / better parking. This was the most frequently cited improvement highlighted by respondents from further afield (i.e. the wider study area), albeit to a much lesser extent than those living locally.

6.44 Respondents from Zone 7 also appeared concerned about the shopping environment; where suggested improvements included more or better pedestrian areas and repairing existing pavements. There is also a concern by some that there are too many coffee shops/ cafes.

Summary

6.45 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Bishop's Waltham District Centre below:

Table 6.4: SWOT Analysis Summary

Strengths	Weaknesses
Attractive and historic centre. Good range of independent shops. Strong service offer. Loyal customer base. Low levels of vacancies.	Narrow streets not suited to cars. Limited parking which may displace shoppers. Relative isolation of Budgen's may not sufficiently support linked trips to the rest of the town centre. Lack of vacancies for new businesses.
Opportunities	**Threats**
Better integration between Budgen's and the PSA. Development opportunities along B2177 near Budgens. Improved food & beverage provision, albeit this may not be supported locally.	Vulnerable to bank/service closures. Loss of shops serving the resident market to tourist offer.

6.46 In summary, Bishop's Waltham is a healthy and historic centre that is currently meeting the needs of its catchment population. Opportunities for development/expansion of the PSA are extremely limited, but there would appear to be potential to improve the overall offer in the longer term by developing the area to the north of the B2177 up to and including the former petrol station site next to the Budgen's supermarket. This could be supported by local demand from proposed housing allocation sites.

NEW ALRESFORD

6.47 New Alresford is located approximately 6 miles to the north-east of Winchester (as the crow flies) and is defined as a district centre in the hierarchy listed in Policy DS1 of the LPP1.

6.48 The defined town centre covers a relatively extensive area extending from the Primary Shopping Areas (PSA) along West Street and Broad Street southwards to include the railway station, which is the base of the Mid Hants Railway's Watercress Line.

6.49 The PSA comprises the whole of the north side of West Street between The Dean and Broad Street and the majority of the frontages on the south side. A short stretch of frontage along the west side of Broad Street is also included, although there are retail and service outlets on both sides of the street at this southern end.

Diversity of Uses

6.50 New Alresford provides a good mix of retail and town centre uses for its local catchment, despite the relative proximity of Winchester.

6.51 All businesses are located in a range of older, mainly historic buildings that contribute to a varied streetscape. A number of businesses are also located to the rear of the main streets and accessed via narrow pedestrian walkways.

6.52 The overall mix of uses is summarised in the table below:

Table 6.5: New Alresford - Current Retail and Service Offer (Units)

	Number of Units	% of Total Units	National Average
A1 - Convenience	7	9.7%	9.7%
A1- Comparison	29	40.3%	31.1%
A1 - Retail Services	11	15.3%	15.7%
A3 - Restaurant /Cafes	10	13.9%	10.0%
A4 - Bars	3	4.2%	4.8%
A5 - Takeaways	2	2.8%	6.1%
A2 - Financial & Business Service	4	5.6%	10.4%
Vacant	6	8.3%	12.2%
Total	72	100.0%	100.0%

Source: LSH survey, October 2019.

Note: Survey boundary reflects the defined town centre boundary for New Alresford in the Winchester Local Plan Part 2 Proposals Map.

6.53 This clearly shows that, whilst the overall offer in the centre is relatively balanced, there is a very high proportion of A1 comparison outlets in the town, with a concentration within the PSA.

6.54 The centre has a below average proportion of A2 financial and business uses. It does however offer a wide range of other service and leisure options, including a community centre, dental surgery, library and a number of medical-related services.

Retailer Representation, Demand & Requirements

6.55 The retail and town centre offer in New Alresford is dominated by independent providers, with just one national multiple business in the PSA (Age UK Charity shop) and 8 overall (Co-op Supermarket & Post Office, Tesco Express, Nationwide Building Society, Lloyds Bank, Coffee #1 and Pizza Express) (10%).

6.56 This mix of independent and national multiples across the range of town centre uses suggests a healthy centre, with no over-reliance on a particular type of national multiple.

6.57 There are no requirements recorded by retail or leisure operators seeking accommodation in the centre. However, requirements may not be listed for commercial confidentiality reasons.

Opening Hours & Evening Time Economy

6.58 A review of shop opening times for a sample of businesses in the town centre confirms that most retailers and services close by 5pm. Both the Co-op and Tesco Express trade until 10pm on Monday to Saturday while the Naked Grape wine shop is open until 8pm on Wednesday to Saturday.

6.59 The centre offers a range of restaurant, bars and public houses which contribute to the evening activity. These businesses are concentrated in the Broad Street area, close to the historic public houses which are located around the Broad Street / East Street / West Street junction.

6.60 Evening activity to the west of the centre is more limited, with a single Indian restaurant located in this area. Other food and drink outlets in the vicinity tend to operate during daytime hours.

Vacancies

6.61 There are 6 vacant units within the centre, although only one of these is within the PSA and this is a small unit in Bakehouse Mews, to the rear of West Street. Of the five vacant units in the rest of the town centre, two are in the process of being refurbished ready for occupation. The overall vacancy rate for the town is therefore low and will decrease further in the short-term.

Barriers to Business

6.62 The lack of vacant units will increase the difficulties for new businesses wishing to open in the centre but the current indications are that some new businesses are succeeding. A Turkish barber is due to open shortly at the junction of East Street / Broad Street and a large Broad Street unit has been split, allowing a second retailer to move it. This outlet is due to open soon.

6.63 There also appears to be opportunities for properties to the rear of the main frontages to be brought into use / reuse, although the commercial practicality of operating from such units is unproven, unless the operator is a specialist business that does not rely on passing trade.

Commercial Rents and Yields

6.64 Reliable information on rents and yields is not available due to the limited size of the centre and number of transactions.

Environmental Quality

6.65 New Alresford is an attractive centre, with many historic buildings. The development of a number of properties to the rear of the main street properties adds to the interest.

6.66 The quality of the built form is high and buildings are generally well maintained. Tree planting along Broad Street adds to the character of the area.

6.67 However, whilst widened pavements improve the environment for pedestrians, the actual road widths, on-street parking provision and through traffic on West Street all detract from the overall attractiveness of the centre for pedestrians. Some street furniture is also rather utilitarian in appearance.

Pedestrian Flows

6.68 Pedestrian flows within the centre are concentrated at the eastern end of West Street and Broad Street where the majority of on-street parking is provided. This area also benefits from the most direct access from the railway station via Station Road.

6.69 Pedestrian flows to the west are more limited but are assisted by the location of the two car parks in the area.

Accessibility and Pedestrian Mobility

6.70 The town centre benefits from good accessibility by road as a result of its proximity to the A31, and this is reflected in a good bus service providing regular services to both Winchester and Alton. There is also a more limited local service serving the residential areas, Old Alresford and the surrounding villages towards, and including Ropley and less frequent services to Basingstoke and Petersfield.

6.71 For visitors and residents travelling by private car, there is on-street parking available along both Broad Street and West Street, with central parking also provided in the former. Off-street Pay & Display parking is provided at the Railway Station and Perins School, with free parking at Arlebury Park, just beyond the town centre boundary. At busy times however, this does not appear to be sufficient to meet demand. It is noted that a new car park is proposed in The Dean which may alleviate some of the pressure for parking in the town centre.

6.72 Within the centre, accessibility for pedestrians is hampered by the presence of parked cars and traffic flows on West Street. Pavements are generally in good condition and are wide, but provision for crossing the roads is less good and inevitably involves a relatively long distance, given the road widths.

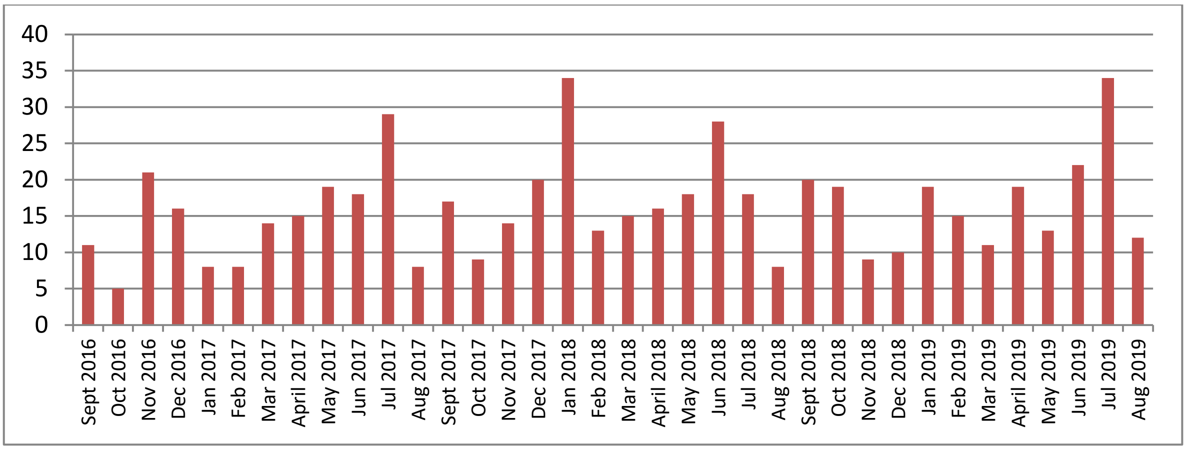
6.73 Accessibility for the less mobile is also made more difficult by West Street being a hill, and not all retail outlets being on the same level as the road. Narrow access ways to some of the rear properties also restrict access.

Safety and Occurrence of Crime

6.74 New Alresford is a generally safe and secure town centre, with respondents in the household survey appearing to take this for granted, neither mentioning it as a feature they like nor suggesting more / better security is required.

6.75 The figure below tracks recordings of crime in New Alresford on a monthly basis between September 2016 and August 2019.

Figure 6.2: Reported incidents of crime in New Alresford - September 2016 to August 2016



Source: Home Office – Crime Map

6.76 The figures show that reports of have increased from 175 reported in August 2016 to 203 in August 2019, which include reports of crime across the New Alresford settlement area. Incidents of crime are taking place across the settlement area and within the town centre reports are relatively low. It is noted that reports of crime are mainly related to shoplifting offences in and around the Co-op store. Other types of occurring crime in the town centre include criminal damage, public order offences, drugs offences, and anti-social behaviour.

Customer Perception of Town Centre

6.77 The household survey indicates that New Alresford is well used by those living in Zones 5 (New Alresford) and 6 (Upper Meon Valley), with nearly a third of all respondents in Zone 5 visiting on a daily basis and a further 54% visiting at least once a week (86% total). Zone 6 residents visit less often but 26% come at least once a week and a further 12% come at least monthly.

6.78 Less frequent visits are made from Zones 1, 2, 3, 4 and 7, but the centre clearly has an extensive draw.

6.79 Respondents were asked what they liked most about the town centre. The table below summarises the most frequent responses given by respondents living in the study area compared with those living in Zone 5, the constituent zone for New Alresford and surrounding residential communities.

Table 6.6 – What respondents 'like' about New Alresford

Study Area Responses	Zone 5 Responses
Attractive environment/ nice place (38.9%)	Close to home (41.8%)
Good range of independent shops (27.0%)	Attractive environment/ nice place (35.3%)
Good pubs, cafes or restaurants (13.3%)	Good range of independent shops (28.1%)
Close to home (9.6%)	Good range of non-food shops (10.1%)
Traditional (8.9%)	Good atmosphere/ friendly people (8.7%)
Nothing/ very little (6.7%)	Good food stores (8.0%)
Good range of non-food shops (6.4%)	Compact (6.6%)

Source: Answers to Q31 HTIS (Appendix B)

6.80 The key attributes of the centre are considered by the household survey respondents to be, its attractive environment (35.3% respondents in Zone 5 and 38.9% overall); the good range of independent shops (28.1% in Zone 5, 27% overall) and the non-food offer (10.1% and 6.4% respectively). The good atmosphere and friendly people are also valued by those living locally (9% / Zone 5), whilst those travelling from further afield consider the pubs, cafes and restaurant offer to be a key feature (13% overall).

6.81 Respondents were asked what improvements would encourage them to visit New Alresford more often. The most frequently suggested improvements cited by respondents in the study area and Zone 5 are summarised in the table below.

Table 6.7 – Suggested improvements to encourage more shopping visits to New Alresford

Study Area Responses	Zone 5 Responses
Nothing (67.8%)	Nothing (45.0%)
Don't know (22.5%)	More/ better parking (23.9%)
More/ better parking (4.9%)	More independent shops (9.8%)
More independent shops (1.4%)	Fewer coffee shops/ cafes (6.7%)
More 'high street' retailers/ multiples (1.0%)	Free car parking (6.4%)
	More 'high street' retailers/ multiples (4.6%)

Source: Answers to Q32 HTIS (Appendix B)

6.82 Based on the number of times 'nothing' is cited to suggestions for improvement, it would appear that those living further afield are more satisfied with New Alresford compared to those living locally. The main improvements respondents would like to see relate to parking provision (more/ better parking and free parking) by over 23% of Zone 5 respondents and 4.9% of respondents overall.

6.83 A need for more independent shops was highlighted by 9.8% of respondents from Zone 5 respondents and was the second most cited suggestion of improvement by study area respondents. At the same time, both respondents from Zone 5 and the wider study area suggested the need for more 'high street' retailers. For local residents in particular, there is a suggestion that residents are concerned about the number of coffee shops and cafes in the town centre.

Summary

6.84 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of New Alresford District Centre below:

Table 6.8: SWOT Analysis Summary

Strengths	Weaknesses
Loyal local customer base and inflows from wider area Residential population within the town centre is relatively high. Attractive and historic centre. Good range of independent shops, particularly selling comparison goods. Low levels of vacancies. Watercress Line Tourist attraction Local events that support footfall.	Limited parking which could be discouraging shoppers. Traffic through centre. Dominance of car as result of on-street parking. Perception that there are too many coffee shops/ cafes. Shops aimed at the visitor market may not be meeting the needs of residents.
Opportunities	**Threats**
Development opportunity by the rail station. The current proposal for a new car park in The Dean would help meet some of the demand for parking in the centre.	Loss of resident shops to tourist offer Increasing traffic may impact on shopper experience and local businesses.

6.85 In summary, New Alresford is a healthy and historic centre that is currently meeting the needs of its catchment population and attracting visitors from a wider area. The railway and local events add to the draw of the centre and increase footfall but parking availability may be insufficient to meet increased demand. Wide roads contribute to the distinctive feel of the centre, but in practical terms can make pedestrian movement more difficult and lead to traffic dominating.

WICKHAM

6.86 Wickham is located to the south of Winchester District, 12 miles (as the crow flies) south east of Winchester and 3.5 miles north of Fareham. It is defined as a district centre in Policy DS1 of the LPP1 but is considerably smaller than either Bishop's Waltham or New Alresford.

6.87 The town centre covers a rectangular area to the east of the A334 Winchester Road and is centred on The Square, where the Primary Shopping Area (PSA) is located. This is the historic heart of the town and now includes the main parking area.

Diversity of Uses

6.88 The retail and town centre offer in Wickham is provided in a number of small units primarily located on either side of The Square, with the main retail outlets towards the western end, close to the junction with the A334. There are also a small number of outlets to the south along the main road.

6.89 National multiples are limited to a Co-op Food store and Post Office, a One-Stop convenience store and Lloyds Bank. This represents just 6% of units.

6.90 Both the national multiples and the independent businesses occupy historic buildings of a variety of styles, many originally built for other purposes. As a result, many of the buildings have relatively narrow frontages but extend back some way, making them less than ideal for modern retailing. This seems to have resulted in a number being configured internally to provide small spaces for a number of separate businesses, the best example being Warwick Lane Indoor Market and Shops.

6.91 The overall mix of retail and service uses is summarised below and includes the separate businesses operating within larger units. For Wickham we have not compared against national averages for the UK due to the size of the centre as it would otherwise provide an unrealistic benchmark to assess diversity of uses.

Table 6.9: Wickham - Current Retail and Service Offer (Units)

	Number of Units	% of Total Units
Convenience Retail	5	10.6
Comparison Retail	17	36.2
Retail Services	10	21.3
Financial & Business	4	8.5
Food & Beverage	10	21.3
Vacant	1	2.1
Total	47	100.0

Source: LSH survey, October 2019

Note: Survey boundary reflects the defined town centre boundary for Wickham in the Winchester Local Plan Part 2 Proposals Map

6.92 This shows that Wickham has a good mix of retail uses and services. There is also a dental practice, a hotel and a nursery within the centre.

6.93 The comparison offer includes a large number of small antiques and gifts outlets which add to the overall attractiveness for visitors and appear to offer business opportunities for local residents.

Retailer Representation, Demand & Requirements

6.94 National multiples in the centre are limited, with just the Co-op Food store and Post Office, a One-Stop convenience store and Lloyds Bank present. This represents just 6% of units.

6.95 There are no recorded requirements identified for Wickham.

Opening Hours & Evening Economy

6.96 Similar to the Winchester's other district centres, most retailers and service businesses in Wickham trade until 5pm. Co-op is the only late opening store; trading until 11pm on Monday to Saturday.

6.97 The centre contains a limited number of public houses and restaurants that will add to the evening activity and this is also likely to be supported by the centrally located Old House Hotel. However, overall levels of footfall are likely to be low.

Vacancies

6.98 A survey of the centre in October 2019 identified one vacant unit within the town centre, resulting in the vacancy rate for the town being just 2%, considerably lower than the UK average of around 12%. We understand that a more recent survey of centre undertaken by the Council has identified two vacant units. Whilst this represents an increase shop vacancies, the level of vacancies is still considered to be low, even for a centre of Wickham's size.

Barriers to Business

6.99 Whilst there was only one vacant unit available in the centre which would restrict the ability of new businesses requiring larger premises from coming to the centre, there appears to be a range of space available for small start-ups and independent businesses. This is provided within existing larger properties, with space available in both Warwick Lane and the Hemming & Co hardware store.

6.100 This is likely to assist local start-up businesses, particularly those wishing to develop antique or second-hand goods enterprises, given the draw of the existing offer.

6.101 Any business requiring more than very limited floorspace however, will find the lack of vacant units a significant barrier.

Commercial Rents and Yields

6.102 Reliable information on rents and yields is not available due to the limited size of the centre and number of transactions.

Environmental Quality

6.103 The Square provides an attractive, spacious setting for the town centre, which is not overly impacted by the parking within it.

6.104 The built form and streetscape are generally of a high quality and the historic buildings are of varied styles adding interest to the street scene.

6.105 The widened pavements at the junction with the A344 and at the eastern end of The Square provide opportunities for outdoor seating and pavements are generally wide and of a good quality.

Pedestrian Flows

6.106 Overall pedestrian flows within the centre are limited as a result of the restricted offer, but tend to be concentrated in The Square between the junction with the A344 and car parking area.

6.107 Very limited pedestrian activity was observed at the northern end of The Square towards Bridge Street, or along the A344 itself.

Accessibility and Pedestrian Movement

6.108 The nature of the town and the competition from larger centres nearby means that the public bus services serving Wickham are more likely to provide opportunities for residents to travel to other shopping destinations, than to bring shoppers to the town. However pedestrian access to the centre from the residential areas is generally good.

6.109 The main car parking is provided in a Pay & Display car park within The Square with parking also provided outside the shops on both sides of the road.

6.110 Accessibility for pedestrians within the centre is generally good, despite the location of the car parking. The town centre access is clearly delineated from the A344 by widened pavements and through traffic is limited. A light controlled crossing provides access across the A344 from the residential areas to the west and crossing points are provided within The Square.

6.111 Pedestrian mobility within the centre is variable, with some areas of good, wide and accessible pavements and clearly delineated crossings. However, the width of The Square and amount of car parking movements associated with the parking provided with The Square, make it less pedestrian friendly, particularly for those with mobility issues.

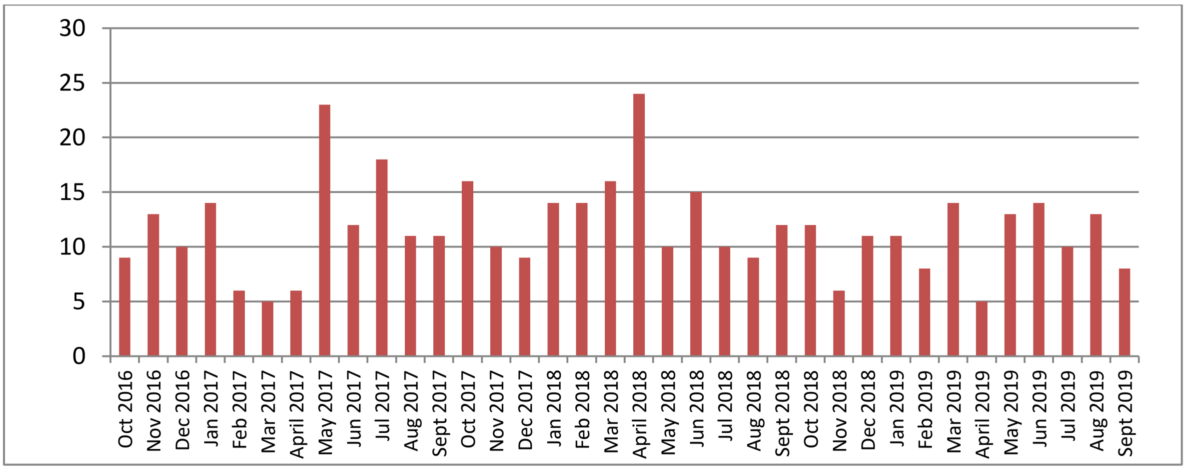
6.112 The age and layout of some of the properties will also make it difficult for those with mobility issues, particularly where a number of small businesses operate from the same premises.

Safety and Occurrence of Crime

6.113 Wickham is a generally safe and secure town centre. The compact nature of the centre is likely to promote a sense of security, with day and evening time activity promoted within one area.

6.114 The figure below tracks recordings of crime in the settlement area of Wickham on a monthly basis between October 2016 and September 2019.

Figure 6.3: Reported incidents of crime in Wickham - October 2016 to September 2016



Source: Home Office – Crime Map

6.115 The figures show that reports of crime have increased from 118 reported in September 2016 to 129 in September 2019, which include reports of crime across the Wickham settlement area. Incidents of crime reported in the town centre itself are low. For example, only 3 reports of crime were recorded in the area around The Square in September 2019, all of which related to public order offences. A review of reports of crime in the town centre for other past months and years show that reports can relate to a wide variety of offences.

Summary

6.116 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Wickham District Centre below:

Table 6.10: SWOT Analysis Summary

Strengths	Weaknesses
Attractive and historic centre. Strong independent retail and service offer. Low levels of vacancies. Good mix of retail uses within a compact centre. Versatile use of space.	Limited size of the centre and range of offer. Lack of vacancies for new businesses. Restricted shopping catchment.
Opportunities	**Threats**
Greater flexible use of space. Build reputation for antiques / collectibles offer. Potential for use of The Square for events.	Potential risk of bank closure. Competition from Whiteley and other high order centres, as well as potential competition with the proposed Welborne Garden Village. Loss of existing day-to-day convenience businesses to tourist orientated offer.

6.117 In summary, Wickham is a healthy and viable centre that provides for the day-to-day needs of local residents and visitors to the town. It provides a good range if limited number of retail and service outlets in an attractive historic setting, with good parking provision. Wickham's offer is clearly distinguished from that provided in nearby Whiteley and relies on a healthy independent sector. It is noted that the proposed Welborne Garden Village (6,500 new homes) approximately two miles south of Wickham, could either increase demand for services at Wickham or draw trade to new centres serving this strategic housing area.

7. QUANTITATIVE RETAIL NEEDS ASSESSMENT

7.1 This section sets out the results of the quantitative retail need ('capacity') assessment for new retail (comparison and convenience goods) floorspace in Winchester District covering the period from 2018 to 2036; further broken down into five year periods (i.e. 2024, 2029, 2034, and 2036). This assessment updates and supersedes the findings of the Council's previous evidence-based studies.

THE CREAT^{E} MODEL: KEY BASELINE ASSUMPTIONS & FORECASTS

7.2 The **CREAT^{e}** economic model has been specifically designed and developed by the LSH team to assess the capacity for and impact of new retail (convenience and comparison goods) development and investment.

7.3 The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with accepted practice and which has supported evidence at Examinations in Public. The model is underpinned by the survey-derived market share analysis. This helps to inform the assessment of the current (convenience and comparison goods) turnovers and trading performance of existing centres, shops and stores at the base year (2019).

7.4 It has necessarily been assumed for the purpose of the capacity assessment that the local retail market in the Winchester District is in 'equilibrium' at the base year (2019). In other words all existing centres and stores are broadly assumed to be trading in line with their expected ('benchmark') turnover levels at the base year. This approach is reasonable, robust and realistic in this case as it reflects the impact of the economic downturn and the significant growth in internet sales on the trading levels and performance of retailers and stores across the UK. It also reflects the potential impact of Brexit on the economy and retail sector going forward.

7.5 On this basis any residual expenditure available to support new retail floorspace over the period 2019 to 2036 will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels (based on population and expenditure growth), and the constrained growth in 'benchmark' turnovers based on applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace. It should be noted that productivity rates have been adjusted to reflect local circumstances, which is explained in more detail later in this section.

7.6 It is important to restate that long-term forecasts should be treated with caution, as they will be influenced by changes in economic, demographic and market trends. As a result we advise that greater weight should be placed on the short term forecasts carried out over a five year period (see PPG, para 004). Notwithstanding this, the Council will need to take account of the forecast capacity for new retail floorspace over the plan period to inform its policy making and site allocations. The NPPF (paragraph 85) states that local planning authorities should meet the need for retail and town centre uses over a **ten-year period** (see Section 2 of this study). Therefore, whilst this study assesses retail capacity up to 2036, emphasis has been placed forecasts over the ten-year period to 2029.

7.7 The updated capacity forecasts set out in this section are intended as a broad guide to enable the Council to assess the broad strategic options for the spatial distribution of new retail-led floorspace and development over the plan period, and to make informed policy choices about where any forecast need should be met, in accordance with the advice set out in the NPPF (paragraph 85). It follows that 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.

7.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT^e Model are described in more detail below.

Base Year Population and Projections

7.9 The 2019 ('base year') population estimates and projections for the study area and zones have been sourced from the Council in respect of Zones 1, 2, 3, 5, 6 and 7, in addition to areas of Winchester that sit within Zone 8. The population for these zones/ areas is based on housing supply identified from the Council's 'Future Local Housing Need Assessment and Strategic Housing and Market Assessment (SHMA). Population projections for Zone 4 and the areas of Fareham and Eastleigh that sit within Zone 8 have been derived from Experian, whose population projections are informed by the ONS[19].

7.10 The population projections for the study area and zones are set out in Tables 1a Appendix A3 and take account of the impact of local housing land supply on population growth within the study area. It should be noted that the population for Zone 8 (Whiteley & Fareham) is likely to be higher due to planned housing at North Whiteley (3,500 homes) and Welborne Garden Village (6,000 homes) in Fareham Borough. The total study area population is projected to increase from 221,201 in 2019 to 247,789 over a ten year period to 2029. This represents a population growth of +26,183 people (+12.1%). In the longer term to 2036, the study area population is projected to grow to 253,930 (+32,729 people/ +12.9%).

7.11 For the Winchester District area only, the projected population (based on the Council's housing-led estimates) is expected to increase from 127,932 in 2019 to 146,738 in 2029 (+18,805 people / +14.7%). Over the longer term from 2019 to 2036, the District's population will increase to 148,566 (+20,634/ +16.1%).

7.12 Experian's population projections are set out in Table 1b Appendix A3 which shows a lower level of population growth for the District area over the study period. The District's population is forecast to increase from by 129,333 in 2019 to 138,294 by 2029 This equates to a growth of +8,961 people (+6.9%), which is considerably lower than the Council's projections over the same period (+18,805 people/ +14.7%). Over the long term (2019-2036), Experian forecast the District's population to increase to 143,085 (+13,752 people/ 10.6%), which is lower than the Council's estimates (+20,634/ +13.9%). Another key difference between the two population scenarios is that Council projects a higher level of growth in the first ten years, with population growth tapering off in the longer term. This has an influence on capacity forecasts.

7.13 For the purpose of the retail capacity assessment we have applied the Council's population projections, which inform the following steps including calculations on available retail expenditure, market share turnover, and residual expenditure to support new retail (convenience and comparison) floorspace. We have benchmarked the findings on retail capacity against capacity based on Experian's population projections.

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[19] 2014-based Sub-National Population Projections (released on 25th May 2016

Base Year Expenditure Per Capita and Forecasts

7.14 Table 2 (Appendix A3) sets out the expenditure per capita estimates for convenience goods and in Table 4 (Appendix A3) for comparison goods for each of the study zones; after making an allowance for special forms of trading (SFT).

7.15 The base year (2019) average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS (please note all expenditure and turnover figures are expressed in 2017 prices).

7.16 The expenditure per capita figures by zone have been grown year-on-year based on the latest Experian Retail Planner Briefing Note 17 (RPBN) published in January 2020. As described in Section 3, Experian forecast more limited year-on-year growth in convenience and comparison goods expenditure than previous forecasts.

7.17 Our allowance for SFT at the local level has been informed by the household survey findings, benchmarked against Experian's SFT market share forecasts for convenience and comparison goods. The survey-derived shares have necessarily been adjusted downwards to reflect the fact that a proportion of online food and non-food sales are sourced from traditional stores rather than from dedicated ('dotcom') warehouses. This follows the advice set out in Experian's latest RPBN. The adjusted SFT market share for comparison goods is 19.2% in 2019, which is above the Experian national average figure of 17.6%. In contrast, the locally adjusted SFT market share for convenience goods of 2.3% is below the national average of 4.2%.

7.18 Clearly if the growth in SFT (online shopping) is higher in the study area than the national projections, then this would effectively reduce the total available expenditure to support existing and new floorspace over the forecast period.

Total Available Expenditure

7.19 Tables 3 and 5 (Appendix A3) forecasts the growth in total available convenience goods and comparison goods retail expenditure, respectively, across the study area and zones between 2019 and 2036 (excluding SFT). It should be noted that available expenditure quoted in the following paragraphs is based on population projections for Winchester District that are informed by Government housing targets to 2036.

7.20 The tables shows that total convenience goods expenditure in the study area is forecast to increase by +12% (+£63.6m); from £530.8m in 2019 to £594.4m by 2029 (2017 prices), increasing to £611.8m (+£81m/ +15.3% from 2019) based on the longer term to 2036.

7.21 Total comparison goods expenditure growth is forecast to be higher over the ten year period to 2029, at +38.7% (+£338.8m); from £875.8m to £1,214.6m. Similarly, growth is higher in the longer term to 2036, increasing to £1,492.7m (+£616.9m / +70.4%).

7.22 The growth in comparison goods expenditure significantly outstrips convenience goods spend over the study period. This effectively means that there should be greater capacity potential for new comparison goods floorspace than for convenience goods retailing; although this will be dependent on the level of retail commitments in the pipeline and the forecast growth in the 'productivity' levels of existing floorspace and stores.

Market Share Analysis (excluding SFT)

7.23 Section 4 described the headline results of the survey-derived (%) market share analysis, including SFT.

7.24 For the purpose of the retail capacity assessment, and in line with accepted approaches, the market share analysis has been adjusted for both convenience goods (Table 1, Appendix A6) and comparison goods (Table 1, Appendix A7) to exclude SFT.

7.25 The next key stage 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. This helps to establish the current 'baseline' (2019) trading performance for the main centres and stores within Winchester District based on expenditure drawn from the study area only. It should be noted that no allowance is made at this stage for any potential 'inflow' (trade draw) of expenditure to centres and stores from outside the defined study area.

7.26 For both convenience goods (Appendix A6) and comparison goods (Appendix A7) the 'baseline' turnovers are projected forward to 2024 (Table 3), 2029 (Table 4), 2034 (Table 5) and 2036 (Table 6) assuming no changes in market shares.

7.27 It should be noted that the 'constant market share approach' is standard practice for retail capacity and impact 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 that new retail investment and development (both within and outside of Winchester) can have on existing shopping patterns, market shares and turnovers over time.

Inflow' (Trade Draw) from outside Study Area

7.28 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores across Winchester we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined study area. The 'inflow' assumptions take account of:

- the scale, offer and location of all existing centres and stores in the respective local authority areas;
- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the study area; and
- the likely retail expenditure derived from people visiting the District, but who live outside the study area (including tourists, visitors and those on business).

7.29 We have also taken account of previous studies and retail assessments to help inform our judgements.

7.30 The assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns. However, it is reasonable to assume that comparison goods retailing in Winchester Town would be the main recipient of shoppers and trade from outside the defined study area. This reflects the centre's strong comparison shopping offer and its sub-regional centre status. However, the household survey evidence suggests that expenditure inflow to the study area from residents living beyond Zones 1 to 3 is relatively modest. This point is supported by household survey data used to inform retail studies for neighbouring authorities, which shows that Winchester Town Centre has limited influence on expenditure beyond the Winchester administrative area. For example, the Town Centre attracts just 3.4% of expenditure from zones that comprise the Test Valley administrative boundary[20]. The 2014 Winchester Retail Study estimated expenditure inflow to Winchester Town at 15%, which was based on a larger study area (included residential settlements in the eastern area of Test Valley District).

7.31 We consider that the town centre is likely to support a reasonable level of expenditure inflow from tourists. Therefore, we have assumed that 20% of Winchester Town's turnover will account for comparison goods expenditure generated by tourists/visitors and other instances of expenditure from passing trade.

7.32 It is assumed that Whiteley Town Centre will draw 10% of its comparison goods turnover from expenditure beyond the study area. This takes account of existing comparison goods retail provision in the centre. Whilst the 2014 Winchester Retail Study identifies a much higher level of inflow, evidence from retail studies from neighbouring local authorities indicate that Whiteley is not a key competitor for comparison goods (or convenience goods) expenditure.

7.33 The district and local centres and smaller villages will generally draw the majority of their shoppers and trade from within their more localised catchments, with limited 'inflow' from outside the study area and reflecting the strength of comparison retail offer in higher order centres both within and outside the District. However, it has been acknowledged that New Alresford and Wickham are likely to support a higher proportion of expenditure inflow (5%) due to these centres being popular with visitors.

7.34 Typically, the 'inflow' of convenience goods expenditure to the main centres and stores from outside the wider study area is more limited than for comparison goods, as households generally carry out their main food shop at their more local and convenient stores, and do not normally travel longer distances for food purchases. The market share analysis confirms this position, which shows that District residents are more likely to shop at larger foodstores in the District, with top-up purchases more likely to be carried out at convenience stores that are closest to home.

7.35 An allowance for inflow has been made for centres that are popular visitor destinations, such as Winchester Town (5% to 10%), New Alresford (5%), and Wickham (5%). It is also realistic to assume inflow to town centres located on the periphery of the District's boundary where the catchment of existing foodstores will extend into neighbouring local authority areas. In this case, we have allowed for some convenience goods expenditure inflow from beyond the study area to foodstores in Whiteley Town Centre (5%). We have also allowed for inflow (5%) of expenditure to foodstores in Weeke given the foodstore offer; particularly the presence of Waitrose, which may attract expenditure from westwards, beyond the study area.

7.36 It should be noted that we have not made an allowance for resident student expenditure as this is included in Experian's estimates for expenditure per capita (Tables 2 and 4, Appendix A3).

Total Turnover of Centres and Stores

7.37 The assessment of the total turnover of all the main centres and stores within the study area is based on the expenditure allocated to these centres/stores according to their survey-derived market shares at 2019, and our judgements as to the total "inflow" of trade to these centres/stores from outside the defined study area.

7.38 The total estimated convenience goods turnovers of centres and key stores in the Winchester District are set out in Table 2 (Appendix A6) and in Table 2 (Appendix A7) for comparison goods. In

[20] Source: Andover and Romsey Retail & Leisure Study 2018

summary, we forecast the following turnovers for the main centres over a ten year period to 2029 and the longer term (2036).

Table 7.1: Turnover of Centres in Winchester District by 2036

	Turnover 2029 (£m)		Turnover 2036 (£m)	
	Convenience	Comparison	Convenience	Comparison
Winchester Town	£41.6	£263.9	£42.4	£322.1
Whiteley District Centre	£15.4	£34.0	£16.0	£41.9
New Alresford District Centre	£13.7	£14.4	£13.9	£17.4
Bishop's Waltham District Centre	£22.6	£23.0	£23.0	£28.0
Wickham District Centre	£7.4	£4.8	£7.7	£5.9
Local Centres	£65.7	£7.6	£67.0	£9.2
(Weeke Local Centre / Waitrose and Aldi)	£55.9	-	£57.0	-
Village and neighbourhood centres	£16.6	£14.5	£16.9	£17.6
Rest of District/ Out of Centre	£101.5	£94.7	£103.5	£115.2
Total	£284.5	£456.9	£290.3	£557.4

Source: Table 1, Appendices A8 and A9

Note: Turnover informed by the Council's population projection. Local Centres include Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/Andover Road, and Weeke. Smaller centres and local shops include all village, smaller settlements and standalone local shops that serve a local community.

Retail Floorspace Commitments

7.39 The next stage in the retail capacity assessment takes into account the retail floorspace and predicted turnovers of all the major food and non-food commitments and policy-led floorspace allocations in the District at the time of preparing this study.

7.40 The assessment of pipeline retail turnover is focused on schemes that provide more 500 sqm (gross) or more of net additional retail floorspace. Table 2 (Appendix A8) sets out the estimated turnover of convenience goods turnover for new commitments in the District, with the corresponding assessment for committed comparison goods turnover provided in Table 2 (Appendix A9).

Floorspace Productivity/ Efficiency

7.41 For the purpose of this retail assessment we have tested the 'sensitivity' of the capacity forecasts based on increasing Experian's year-on-year floorspace 'productivity' growth rate, which are discussed in Section 3. In the current economic and retail climate we consider that existing retailers and floorspace will need to achieve higher annual 'productivity' growth rates to absorb increasing costs (including, for example, rising rents, business rates and wages) in order to remain profitable and viable over the long term; and this is especially the case where opportunities for additional new floorspace is limited.

7.42 As highlighted in Table 3.3 of Section 3, Experian Business Strategies (EBS) provide estimates on floorspace productivity growth based on two different development scenarios:

- '*Constant floorspace'* – where there is limited scope for new retail development resulting in greater efficiency of existing floorspace (Figure 3b and 3c, Retail Planner Briefing Note 17, January 2020)

- '*Changing floorspace'* – allows for new retail development reflecting the rate of retail schemes coming forward nationally (Figure 4b and 4c, Retail Planner Briefing Note 17, January 2020)

7.43 In our judgement the most realistic and robust position in this case should take account of local factors, and particularly the lack of available town centre sites for new retail development in Winchester Town. Therefore, we have applied a 'constant floorspace' scenario) to take account of predictions of suppressed retail development across the UK, which is expected to be the case for Winchester, alongside a lack of town centre sites to accommodate new retail floorspace.

Retail Capacity Assessment

7.44 The Winchester-wide capacity forecasts for new retail floorspace in the District up to 2036 are set out in Table 4 (Appendix A8) for convenience goods and Table 3 (Appendix A9) comparison goods.

7.45 It has been assumed for the purpose of the capacity assessment that the Winchester's retail market is in 'equilibrium' at the base year. In other words we assume that the existing centres and stores in Winchester are trading in line with appropriate 'benchmark' turnover levels at the base year. This is supported by the findings of the centre audits and site visits which did not show any strong indication of 'overtrading' in the main town centres and stores. This approach also reflects the impact of the economic recession and the growth in internet sales, which has reduced trading levels across the UK. On this basis, any residual expenditure available to support new retail floorspace within the study area over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace.

7.46 Please note that all quoted retail floorspace capacity figures refer to net sales area unless otherwise stated.

Convenience Goods Capacity

7.47 Appendix A8 sets out and explains the key steps underpinning the convenience goods capacity assessment. In order to convert the residual expenditure into a net sales floorspace figure we have assumed an average sales density for types of convenience floorspace formats[21]. An average sales density of £10,000 per sqm is applied to the base year and projected to forecast years using Experian's productivity/ efficiency growth rates.

7.48 The 'baseline' residual expenditure and floorspace capacity forecasts are summarised in the tables below. Forecast capacity is based on the Council's housing and population projections over the study period (2019 to 2036). The forecasts identified for each period represent cumulative capacity for that point in time.

Table 7.2 Winchester-wide Convenience Goods Capacity Forecasts – Council's Population Projections

	2024	2029	2034	2036
Residual Convenience Expenditure (£m):	-£1.4	£8.9	£8.4	£6.8
Convenience Floorspace Capacity (sqm net):	-137	853	795	634

[21] Including 'superstore format' (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose, and Marks and Spencer; and including their 'local' formats), Limited Assortment Discounters ('LADs') (e.g. Lidl and Aldi), and national convenience stores (e.g. Nisa, Budgens, Co-op, etc.).

Source: Table 3, Appendix A8

7.49 As the table above shows, after allowing for committed convenience floorspace there is limited capacity over the short term (up to 2024) to support new convenience floorspace in the District as a whole. By 2029 capacity emerges to support 853 sqm net sales of new convenience floorspace, and reducing to 634 by 2036.

7.50 In contrast, based on Experian's population projections and once forecast turnover of committed convenience floorspace is taken into account, the assessment identities no capacity to support new convenience floorspace over the entire plan period.

7.51 To further inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) floorspace in the Winchester area, we have also assessed the localised ('centre-by-centre') capacity based on the Council's population projections. The results are presented in Tables 4 to 13 of Appendix A8 and summarised in the table below.

Table 7.3 Winchester's Centres: Capacity for New Convenience Goods Floorspace (sqm net sales)

	2024	2029	2034	2036
Winchester Town	-115	41	29	3
Whiteley District Centre	24	62	71	70
New Alresford District Centre	56	92	81	71
Bishop's Waltham District Centre	137	220	215	201
Wickham District Centre	12	31	34	33
Weeke Local Centre	101	334	325	290
All Other Local Centres, Smaller Centres & Local Stores	146	237	228	211
Rest of District/Out of Centre	-497	-163	-188	-244
Winchester District	-137	853	795	634

Source: Table 12, Appendix A8

Note: Local Centres include Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/Andover Road, and Weeke. Smaller centres and local shops include all village, smaller settlements and standalone local shops that serve a local community.

7.52 The centre-by-centre assessment highlights indicative economic capacity of the following quantum (sqm net sales) by 2029. As the table above shows, there limited capacity identified over the ten year period to 2029 for Winchester Town (41 sqm net sales), Whiteley (62 sqm net sales), New Alresford (92 sqm net sales) and Wickham (31 sqm net sales) to support new convenience floorspace.

7.53 Forecast need in 2029 is greatest for Weeke Local Centre (334 sqm net), which is attributed to strong market shares supported by the Aldi and Waitrose stores. For the purpose of the capacity assessment, we have assumed that 25% of the turnover generated from the new convenience floorspace permitted in the nearby local centre at Barton Farm would to be drawn from foodstores in Weeke. This turnover has been discounted from residual expenditure generated for Weeke and results in forecast capacity for up to 334 sqm net sales of new convenience floorspace by 2029. Even in the event of a foodstore coming forward for Barton Farm, it is possible that foodstores in Weeke could increase their market share by attracting new expenditure from new residents in Barton Farm, which would increase forecast capacity. This would be identified as part of a future update of the capacity assessment.

7.54 Bishop's Waltham (220 sqm net) also supports a notably higher quantum of forecast need, particularly compared to other district centre. The results are influenced by relatively strong market shares for Zone 7 (the town's constituent zone) and the application of the higher population projection rate for this zone which to take account of proposed housing supply allocations in the area.

7.55 Winchester's smaller centres and villages are forecast to generate a combined floorspace capacity of 240 sqm net sales and this reflects the limited convenience offer and market share that these centres provide for. This is a very modest capacity over a number of centres and would not require a specific site allocation.

7.56 However, it is important to note at the outset that any forecast capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other 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. Furthermore, any potential capacity generated by foodstores in out-of-centre locations should be directed to town centres first in accordance with the NPPF and Local Plan policy.

7.57 It should be noted that forecast capacity does not take account of the opportunity to re-occupy existing vacant retail floorspace within Winchester's centres. It is expected that vacant floorspace in prime retail areas could accommodate some of the forecast convenience capacity. A review of vacant properties identifies a number on the High Street and within the Brooks Shopping Centre. We consider the potential reoccupation of these units as part of the assessment of comparison goods capacity.

7.58 Finally, should the Council consider the potential for new convenience retail floorspace within new developments then this should be prioritised to existing town and district centres in Winchester District or where it is to support new local facilities serving major new housing areas, such as Barton Farm. This will ensure development is directed to the most sustainable and sequentially preferable locations. This approach is particularly relevant to centres where provision of new convenience provision or enhancement of existing provision could help to attract new shoppers to the centre and support footfall for the town centres as a whole through linked trips with other town centre businesses.

Comparison Goods Capacity

7.59 The key steps in assessing Winchester-wide capacity for comparison goods expenditure and floorspace are set out in Table 4 of Appendix A9.

7.60 As for convenience goods this approach assumes 'equilibrium' at the base year and constant market shares over the forecast period. The forecast residual expenditure capacity for both capacity scenarios 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 sqm at 2019. This is broadly equivalent to an average sales density for retail units in secondary sub-regional town centres.

7.61 However, average sales levels inevitably vary between different locations, different retail formats, and different operators. 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 plan making and in assessing and in determining applications for different operators and different types of retail floorspace in different locations (such as, for example, 'bulky goods' retail warehousing). Even within bulky goods categories sale densities can vary. For example, bulky goods retailers that focus on DIY, garden and furniture products typically command lower sales densities while retailers that include electrical goods achieve higher sales densities.

7.62 The residual expenditure and floorspace capacity forecasts against the Council's population projections are summarised in the tables below and take account of the forecast turnover of committed comparison goods floorspace.

Table 7.4 District-wide Comparison Goods Capacity - Council's Population Projections

	2024	2029	2034	2036
Residual Expenditure (£m)	£10.0	£20.3	£18.6	£16.7
Comparison Floorspace Capacity (sqm net):	1,676	2,961	2,329	1,852
Comparison Floorspace Capcity minus prime vacant floorspace in Winchester Town (sqm net):	1,150	2,435	1,802	1,326

Source: Table 3, Appendix A9

Note: Equilibrium assumes that market shares identified for Winchester District and centres within remain constant over the forecast period.

7.63 As the tables above show, the District has the potential to support up to 1,676 sqm net of new comparison goods floorspace in the short term (5 years to 2024). Forecast capacity increases to 2,961 sqm net sales by 2029. Over the longer term forecast capacity reduces to 1,852 sqm net. This is due to a number of factors including a slowdown in population growth based on the Council's population projections, which are linked to housing sites coming forward in the short to medium term, while over the longer term economic forecasts show a slowdown in comparison goods expenditure growth and a steady increase in online sales. We have also assumed that productivity growth of existing comparison goods turnover will take account of limited potential to support new retail development. The combined effect of these economic factors impact on residual expenditure to support new comparison goods floorspace in the longer term.

7.64 The above table also considers the potential for prime vacant retail floorspace in Winchester Town Centre could be reoccupied for retail, thereby addressing some of the forecast need for new comparison goods floorspace. Based on a review of units available to let in January 2020 in Winchester Town's prime retail area[22] some 526 sqm net sales of vacant retail floorspace is identified. This would reduce the District-wide forecast need for new comparison floorspace from 2,961 sqm net to 2,435 sqm net in 2029.

7.65 An alternative capacity forecast scenario based on Experian's population projections show that the Council's population based capacity scenario is considerably higher in the short to medium term. As highlighted before, this is due to the Council's population projections showing a stronger rate of population growth up to 2029. Over the longer term (2029 to 2036), the capacity results for the two different population scenarios broadly align.

7.66 The forecast District-wide capacity based on the Council's population projections has been disaggregated on a 'centre-by-centre' basis by taking account of the relative trading performance and market shares of each centre at the base year. The results are summarised in the table below.

[22] Based on shop units currently 'to let' on High Street, Parchment Street, and the Brooks Shopping Centre (Upper Level only).

Table 7.5 Winchester's Centres: Comparison Goods Capacity - Council's Population Projections

	2024	2029	2034	2036
Winchester Town	1,279	2,122	1,780	1,479
Whiteley District Centre	123	181	164	149
Bishop's Waltham District Centre	140	208	170	140
New Alresford District Centre	54	70	33	15
Wickham District Centre	15	21	17	15
All Local Centres	53	81	73	63
All Other Smaller Centres & Local Stores	67	94	66	50
Rest of District/ Out of Centre	-54	184	24	-58
Total: Winchester District	1,676	2,961	2,329	1,852

Source: Table 11, Appendix A9

Note: Assumes equilibrium. Note: Local Centres include Denmead, Kings Worthy, Oliver's Battery, Stockbridge Road/Andover Road, and Weeke. Smaller centres and local shops include all village, smaller settlements and standalone local shops that serve a local community.

7.67 The assessment shows that the majority of forecast need for new comparison goods floorspace is focused on Winchester Town, with 2,122 sqm net identified by 2029. Forecast capacity for the town centre reduces to 1,479 sqm net by 2036. If prime vacant floorspace is taken into account forecast capacity would reduce to 1,150 sqm net in 2029 and 953 sqm net by 2036.

7.68 Forecast capacity varies in floorspace quantum for other centres in the District and reflects current levels of market share for comparison goods expenditure achieved by the different centres, and the pattern of housing growth over the plan period. For Whiteley, 181 sqm net of comparison goods floorspace is forecasted over the ten year period to 2029. However, in reality, the major planned housing development at North Whiteley will generate capacity and demand for new services, including an element of comparison goods retailing.

7.69 For Bishop's Waltham, the assessment identifies a need up to 208 sqm net of new comparison retail floorspace in 2029; reflecting the application of the higher population projection rate for this zone which to take account of proposed housing supply allocations in the area. Forecast need is limited for Winchester's other district centres and would not justify site allocations in any specific centre.

7.70 The assessment also considered capacity in the rest of the District, which largely relates to out of centre comparison goods retail destinations. The assessment shows residual capacity to support 184 sqm net of new comparison goods floorspace by 2029, reducing to -58 sqm by 2036. However, given the modest capacity involved and the 'town centres first' approach, this would not in itself justify out of centre site allocations.

ACCOMMODATING FORECAST NEED FOR RETAIL FLOORSPACE

7.71 The capacity assessment has revealed limited capacity to support retail floorspace over the forecast period to 2036 and where capacity is identified it is largely to support comparison goods retail in Winchester Town Centre.

7.72 Focusing on the Winchester Town Centre, much of the capacity identified could potentially be accommodated within the **Central Winchester Regeneration (CWR)** area. The CWR area SPD identifies capacity for 3,000 sqm (GEA) to 8,000 sqm (GEA) of floorspace to accommodate retail uses.

7.73 As highlighted in the tables above, the capacity assessment identifies District-wide capacity for comparison goods retail at 2,961 sqm net, when allowing for the occupation of prime vacant floorspace in Winchester Town. This figure equates to 4,230 sqm gross and reduces to 2,435 sqm by 2036. As such, the CWR area has the potential to accommodate all of the forecast need for new comparison retail floorspace in the District. However, in reality, some of the forecast floorspace for comparison goods will be addressed through small scale increases in provision across the District's centres.

7.74 Whilst there is capacity identified from the 'rest of District', opportunities to support new comparison retail floorspace should be directed as a priority to Winchester's existing centres, particularly Winchester Town Centre.

7.75 The potential to accommodate forecast convenience goods floorspace, albeit minimal for most centres in the District, should be focused on improving existing provision. This could come in the form of extending or replacing existing convenience and foodstores, particularly in Winchester's district centres. This would help to claw back leaked convenience expenditure to the District's out of centre foodstores and to foodstores in centres outside of the District.

8. COMMERCIAL LEISURE NEED

8.1 Leisure uses can make a significant contribution to a town centre's vitality and viability. For example, a good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover in centres, with significant benefits for both daytime and evening economies.

8.2 However, forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing, as the sector is highly complex and dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently, the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and less sophisticated than for retail capacity forecasts.

8.3 In this context our analysis focuses on the following key elements:

8.4 A review of the key trends driving market demand in the sector over the last decade;

- An audit of existing commercial leisure uses in the Winchester council area to help identify any marked ‘gaps’ in provision;
- A review of the results of the household survey to understand current commercial leisure participation rates and preferences across the study area; and
- A broad economic assessment of the need for new additional leisure facilities across the main centres based on different datasets and accepted approaches.

8.5 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that are widely accepted as making a significant contribution to the overall vitality and viability of town centres; namely food and beverage (F&B) uses (Class A3-A5), cinemas and health clubs and gyms, and to a lesser extent ten-pin bowling, casinos and bingo halls. We have also considered demand for other leisure/entertainment facilities such as ten-pin bowling, skating rinks, and attractions unique to Winchester.

8.6 Detailed tables on forecast commercial leisure capacity, including projections on expenditure and need are set out below.

8.7 It should be noted that in the forecasts for leisure expenditure do not take account of the likely impact of COVID-19 on expenditure growth, particularly the certain drop in expenditure for most categories as a result of closures of all town centre leisure businesses (the exception being takeaway and home delivery food services) during the Government’s ‘lock down’ period. It is unknown how the Government’s response to the pandemic will impact on leisure businesses in the short term.

LEISURE EXPENDITURE GROWTH

8.8 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

8.9 The table below compares average expenditure per head per annum on commercial leisure services based on Experian data. It shows that household spending on leisure services is dominated by the restaurant and café category (including pubs).

Table 8.1: Estimates of Expenditure per Capita on Leisure Services in 2017 (£ per annum)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation and sport	Restaurants, cafes etc	Total
Zone 1	Central Winchester	£225	£324	£115	£126	£158	£1,394	£2,341
Zone 2	North Winchester	£323	£332	£100	£155	£167	£1,384	£2,459
Zone 3	City South	£301	£337	£108	£162	£181	£1,463	£2,550
Zone 4	Eastleigh	£247	£334	£136	£139	£147	£1,366	£2,369
Zone 5	New Alresford	£345	£344	£114	£170	£173	£1,391	£2,537
Zone 6	Upper Meon Valley	£428	£356	£92	£181	£211	£1,453	£2,721
Zone 7	Bishop's Waltham	£321	£335	£105	£155	£163	£1,362	£2,441
Zone 8	Whiteley & Fareham	£252	£320	£124	£135	£146	£1,306	£2,282
Study Area Average		£305	£335	£112	£153	£168	£1,390	£2,463

Source: Table 2, Appendix A10

Note: Figures relate to 2017 base year estimates for expenditure

8.10 The most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 17 (February 2020) showed the biggest fall in annual growth for the forecast period in 2018 at -1.5% improving to -0.9% in 2019. Growth is forecast to return again in 2020 at 0.9%. In the medium and long term (2022-2036) growth in leisure expenditure stabilises at +1.2% per annum. This forecast growth is higher than annual average historic growth rates for the period 1997-2018, when there was no growth in leisure spend.

8.11 The base year expenditure per capita levels for leisure (table below) have been projected forward to 2036 using Experian's forecast annual growth rates, and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services.

Table 8.2: Total Forecast Growth in Commercial Leisure Expenditure: 2019 – 2036 (£m)

		2019	2024	2029	2034	2036	Growth 2019-2029		Growth 2019-2036	
Zone 1	Central Winchester	£123.8	£143.4	£162.3	£175.1	£179.3	£38.5	31.1%	£55.5	44.8%
Zone 2	North Winchester	£39.9	£46.2	£52.2	£56.3	£57.7	£12.4	31.1%	£17.9	44.8%
Zone 3	City South	£42.9	£49.7	£56.3	£60.7	£62.2	£13.4	31.1%	£19.2	44.8%
Zone 4	Eastleigh	£150.5	£166.6	£184.1	£202.0	£209.3	£33.6	22.3%	£58.8	39.1%
Zone 5	New Alresford	£27.1	£31.4	£35.5	£38.3	£39.2	£8.4	31.1%	£12.1	44.8%
Zone 6	Upper Meon Valley	£6.7	£7.0	£7.3	£7.7	£7.8	£0.6	9.1%	£1.1	16.0%
Zone 7	Bishop's Waltham	£28.7	£30.0	£31.3	£32.8	£33.3	£2.6	9.1%	£4.6	16.0%
Zone 8	Whiteley & Fareham	£85.1	£95.0	£105.3	£114.2	£117.6	£20.3	23.8%	£32.6	38.3%
Study Area Total		£504.7	£569.3	£634.5	£687.0	£706.5	£129.8	25.7%	£201.8	40.0%

Source: Table 4, Appendix A10

8.12 As the table above shows, the available commercial leisure expenditure across the defined study area is forecast to increase by 25.7% (+£129.8m) up to 2029; increasing by 40% (+£201.8m) over the longer term (2019 to 2036).

8.13 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out (food and beverage). This highlights the potential to enhance the scale and quality of Class A3-A5 uses in the centres over the development plan period, subject to market demand.

8.14 Against this background, the following commentary identifies the potential 'gaps' in the commercial leisure offer of Winchester's main centres and the likely need for new uses and facilities over the forecast period to help maintain and enhance the daytime and evening economies of the District's centres.

EATING AND DRINKING OUT

8.15 The food and beverage (F&B) sector includes restaurants, cafés, bars and pubs (Class A3-A5). These uses are an integral part of a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times' (i.e. the time people spend in centres), increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

8.16 The F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend on F&B is also forecast to experience the greatest volume growth up to 2036. In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of Class A3-A5 uses across the District and in its main centres, particularly Winchester Town. In reality though, this growth will be determined by current and future trends in the sector and market demand. The table below summarises of some of the current trends that are driving changes in the food and beverage sector.

Table 8.3: Key trends in the food and beverage sector

Use:	Headline Market Trends:
Restaurants	This sector has experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include an increase in '*eating at home'*, which has increased sales for takeaways and deliveries. Restaurants are increasingly entering the home delivery market using online third-party delivery companies (such as Just Eat, Deliveroo and Uber Eats). Customers are increasingly basing their decisions to eat out on '*value for money'*, but not at the expense of quality in terms of service, food and the overall experience.
Pubs and Wine Bars	Pub operators have widened their food and non-alcoholic beverage offer the last decade, resulting in the growth of so-called "*gastro-pubs*" and, most recently, the rise in 'micro pubs'. Notwithstanding this trend, the sector has also been characterised by increasing consolidation and closures. This is mainly explained by high occupancy costs (e.g. business rates) and beer duty, and changes in consumer demand and drinking habits. As a consequence there has been a significant increase in the conversion and/or redevelopment of pubs to alternative uses over the last decade; including for residential uses and/or convenience retailing (e.g. Tesco Express and Sainsbury's Local). Recent research by CAMRA indicates that some 854 pubs closed in 2018 and there were approximately 41,500 pubs open in early 2019. On a positive note the number of closures slowed from 980 in 2017. This slowdown most likely reflected the impact of new planning policies and the recognition of pubs as *'Assets of Community Value*' (ACV). Nevertheless, the figures for 2018 still represented more than 14 closures per week. Figures from the ONS show that the number of small pubs in the UK (defined as having fewer than 10 employees) has almost halved since the turn of the century; from 38,830 in 2001 to 22,840 in 2018. The latest figures show a slight (+0.4%) increase to 22,925 in 2019, which also probably reflects the impact of policy changes and also the rise of 'micro pubs'.
Cafés and Coffee Shops	This sector has experienced strong growth over the last decade. Latest figures show that the UK coffee shop market comprises some 25,500 outlets and is valued at £10.1bn[23]. Costa Coffee, Starbucks and Caffè Nero are the three largest chains in the UK, with 2,655 outlets and a total market share of 53%. The UK branded coffee shop market is estimated to exceed 10,000 outlets by 2023, equivalent to a 5-year compound annual growth rate of 5%. Notwithstanding the rise of the multiples, this sector has also been characterised by growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic, in-house roasted beans, and Fairtrade). In the specialty segment, artisan concepts continues to grow (such as 'Department of Coffee' and 'Social Affairs'). Others include London-based 'Grind' and 'Caravan'. The strong independent coffee sector has also fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, the continued growth of the coffee shop market is one of the most successful in the UK economy

[23] *Source: Allegra World Coffee 2019 (Project Café UK 2019)*

8.17 Research shows that the multiple chains mainly dominated the expansion of the F&B sector up to 2017 when they accounted for almost half of all net new business openings. However, since 2017 a number of multiples in the casual dining sector have struggled against a backdrop of increased competition, rising costs and a tightening of consumer spending due to wider Brexit and economic concerns. The reality is that too many F&B operators expanded too quickly into increasingly marginal locations, funded by private equity, and the market became saturated and unsustainable. The growth in the availability, convenience and speed of home deliveries driven by new technology and apps represents a further significant challenge to more traditional F&B operators. Research predicts that the food delivery market in 2020 will have a value of almost £5bn, which represents a growth of +17% since 2018.

8.18 These new challenges and pressures have resulted in a radical restructuring of businesses across the sector, resulting in the closure of many loss-making branches. It is estimated that some 1,412 UK restaurants closed in the year to the end of June 2019. This represented a +25% increase on the previous year and was the highest number of insolvencies recorded since 2014, when approximately 750 restaurants closed. Both the larger multiples and smaller independent restaurant operators have been affected. The table below shows some of the higher profile "casualties" over the last two years:

Table 8.4: The "casual dining" sector – trends and "casualties"

Operator/Brand:	Headline Market Trends:
Strada	The Italian restaurant chain has just three restaurants now operating in London after closing most of its restaurants across the UK since 2017.
Jamie's Italian	Jamie Oliver's Restaurant Group which was established in 2008 went into administration in May 2019. It closed 22 out of its 25 restaurants, with the loss of over 1,000 jobs. The brand's only remaining UK operation is trading via a franchise in Gatwick Airport.
Byron Burger	The burger change closed 19 outlets in 2018 under a Company Voluntary Agreement (CVA) after reporting post-tax losses of $47.2m to June 2018. As part of its repositioning, it is also investing in its takeaway and delivery offer, as this contributed a 14% increase in its sales for 2017/18 compared with 4.7% decline in overall like-for-like sales.
Prezzo	Closed over 100 outlets in 2018, resulting in the loss of over 1,000 jobs. This was equivalent to approximately one-third of the chain's restaurant portfolio, which includes Prezzo, Mexico and Cleaver brands and all 33 Chimichanga restaurants.
Carluccio's	The Italian restaurant group closed 35 of its 105 restaurants in 2018 as part of a Company Voluntary Agreement (CVA), resulting in the loss of some 500 jobs. It has since introduced a new business strategy – called 'Project Fresca' – which involves transforming selected restaurants funded by £10m of private investment (including in Richmond) to position the business in the '*premium casual dining'* sector.
Restaurant Group	The Group owns a number of different brands (including Wagamama, Chiquito and Frankie & Benny's). Although Wagamama has performed relatively well, the Group announced in 2020 that it would close up to 90 of its Chiquito and Frankie & Benny's restaurants by 2021.
Pizza Express	Operates over 480 outlets in the UK and Ireland, but had a reported debt of over £1bn in 2019. There is speculation that they will be forced to close a number of their poorly performing outlets. However as at March 2019 the operator that there were no plans for closures.
GBK	Gourmet Burger King entered into a CVA in November 2018. It reported operating losses of over £4.5m in the year end to February 2019. It has since closed 24 of its 80 restaurants (including in Hull and Leicester), with the loss of c.250 jobs. This has helped to stabilise the business.
Patisserie Valerie	Forced into administration in January 2019 after the fall-out from its debts and an accounting scandal in October 2017. Some 71 out of 200 cafés were closed. It was bought of out administration by Irish private equity firm Causeway Capital Partners in February 2019 for a reported £5m. The new owners are seeking to reposition the businesses as a 'premium' brand and closed a further 14 outlets in July 2018 that did not fit their vision.

Source: Various

8.19 The recent Coronavirus pandemic is also likely to lead to a further wave of "casualties" in the F&B sector. Experts predict that after a further "shakeout" in the sector only the proactively managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer will survive. Notwithstanding these trends, there are a number of recent success stories that provide hope for the sector, including Nando's the South African restaurant chain, which recorded bumper sales in 2018/19, and Wagamama. The bakery sector has also benefitted from new brands, including the Nordic-owned Ole & Steen and Gail's Artisan Bakery.

8.20 Pubs and takeaway outlets should also continue to outperform restaurants as they are better positioned to satisfy the demand for lower-cost, convenient meals. For example, McDonalds reported a +5.9% year-on-year growth in global sales in 2019 and opened 40 new sites in the UK in 2019. It is committed to investing £1bn in UK over the next three years, with focus on new openings, refurbishments and improving the "digital experience" for customers. This includes trialling a new "grab-and-go" format with no seating and smaller self-order screens on London's Fleet Street.

8.21 F&B operators, like retailers, will also need to understand and cater for the needs of the changing demographic and consumer market to remain relevant and viable. For example, Section 3 identified that Millennials (under 35s) make-up almost one-quarter of the UK population and research shows that they spend a substantial 13% of their disposable incomes on eating and drinking out . Looking ahead, by 2025 it is estimated that Millennials will make up over 80% of all parents in the UK, meaning that restaurants, pubs and cafés will also need to evolve and adapt to cater for the changing needs of new 'Millennial families'. This could be driven for example, by increasing emphasis on convenience, affordability, entertainment, uniqueness and the use of technology and apps and more emphasis on organic, vegetarian/vegan and local sustainably sourced produce that respond to customers' changing tastes and concerns with regard to climate change. Forecasts indicate that vegans and vegetarians could make up a quarter of the British population in 2025. This trend has impacted on the business models and menus of a number of the leading national restaurant and takeaway operators. For example, 'Pret A Manger' has some 400 outlets in the UK and acquired 110 outlets operated by its rival Eat in 2019. Pret plans to rebrand some of the acquired sites as 'Veggie Pret' to tap into this growth, and the first outlet opened in 2016 in Soho, London, after a month-long 'pop-up' trial.

8.22 There is also the potential for restaurants and pubs to tap more into the growth in home deliveries, with the potential to reach new audiences and increase turnover at quieter times. However operators will also face the challenge that commissions payable to these platforms are typically in the range of 20-25% of the total order value, with the loss of drink sales also associated with delivered food.

8.23 In this context it is no coincidence that the popularity of street food, market halls and "meanwhile"/"pop-up" restaurants and bars has also coincided with the growth in the spending power and influence of the Millennials. These more informal drinking and eating venues fulfil their desire to experiment and explore different styles of drink, food and new cuisines in exciting new and more informal environments. Trialling a "pop-up" site also represents an opportunity to test a new concept, gain a following, fine-tune details and secure investment before making a long-term commitment. The pop-up concept is also attractive to landlords and property companies who are increasingly nervous about signing long leases following numerous high profile restaurant closures. For Winchester, the town's student population and the popularity as a visitor destination would appeal to this market sector. Formats such as an indoor foodhall or 'container village' would diversify the town centre's food and beverage offer and provide a platform for start-up and independent operators. Such investment would be subject to identifying an appropriate site.

8.24 Turning to existing food and beverage provision in the District, provision is good for all main centres, but particularly Winchester Town. The health check assessment highlighted how the centre benefits from a number of premium restaurant brands and a strong offer in cafes, particularly independents. Furthermore, feedback from household survey indicates that current offer is a positive attribute for the centre.

8.25 The household survey identified that 82% of people living in the study area visit restaurants and cafes. The survey also identified where respondents from the eight study zones normally dine out. The results summarised in the table below:

Table 8.5: Market Shares for Eating Out (Restaurants and Cafes)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Study Area
Winchester Town	86.1%	66.1%	67.9%	24.5%	23.1%	33.9%	7.5%	3.5%	37.1%
Whiteley	0.0%	0.0%	0.0%	1.8%	0.0%	1.1%	5.1%	23.9%	5.8%
Bishop's Waltham	0.0%	0.0%	1.3%	1.9%	0.0%	4.5%	38.9%	1.4%	5.1%
New Alresford	0.4%	0.0%	1.3%	0.0%	55.1%	8.7%	0.0%	0.0%	2.7%
Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	1.5%
Other, Winchester	0.0%	0.0%	2.7%	0.0%	0.7%	0.7%	3.8%	0.0%	0.6%
District Retention	86.5%	66.1%	73.2%	28.1%	79.0%	49.0%	55.3%	36.2%	52.9%
Eastleigh	6.1%	2.6%	6.0%	24.3%	2.6%	0.7%	1.0%	0.0%	9.1%
Fareham	0.0%	1.3%	0.0%	0.9%	0.0%	0.7%	3.5%	33.2%	7.3%
Southampton	0.0%	2.5%	2.5%	7.2%	1.9%	9.4%	2.8%	5.0%	4.0%
Other	3.5%	18.5%	10.6%	21.7%	11.7%	21.6%	27.6%	18.8%	16.6%
Outside District	9.6%	24.9%	19.1%	54.1%	16.2%	32.5%	34.9%	56.9%	37.0%
Don't know	3.9%	8.9%	7.7%	17.8%	4.8%	18.5%	9.8%	6.9%	10.1%

Source: Question 43, Household Telephone Interview Survey, Appendix B

8.26 The survey findings on dining out habits indicate that the majority (52.9%) of respondents living in the study area visit cafes and restaurants in Winchester with over a third (37.1%) preferring cafes and restaurants in Winchester Town. This likely reflects the strength of café and restaurant offer in the city centre.

8.27 Generally, respondents are more likely to visit cafes and restaurants in centres that are in close proximity to where they live. For example, within Zone 1, the vast majority (86.1%) of respondents visit venues in the city centre, while over half of respondents in Zone 5 (New Alresford) choose venues in New Alresford. Over a third of respondents from Zone 7 visit cafes and restaurants in Bishop's Waltham. Respondents living in Zone 8 are more likely to visit cafes and restaurants in Whiteley (and Fareham). It is noted that Wickham attracts a limited market share compared to the Winchester's other district centres.

8.28 Respondents to the survey were also asked where they are more likely to go to visit pubs, bars, and nightclubs. The table below summarises the survey findings for this activity.

Table 8.6: Market Shares for Pubs, Bars, and Nightclubs

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Study Area
Winchester Town	77.7%	46.2%	49.5%	22.1%	6.3%	8.2%	6.0%	3.3%	31.6%
Whiteley	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	11.6%	2.2%
Bishop's Waltham	0.0%	0.0%	1.8%	0.5%	0.0%	0.9%	37.1%	2.8%	4.6%
New Alresford	0.4%	0.0%	0.0%	0.0%	74.3%	6.0%	1.3%	0.0%	3.4%
Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	12.9%	2.5%
Other, Winchester	0.0%	0.0%	6.0%	0.7%	0.0%	0.9%	8.1%	0.0%	1.5%
District Retention	78.2%	46.2%	57.3%	23.8%	80.6%	16.0%	53.8%	30.6%	45.8%
Eastleigh	5.0%	0.0%	0.0%	26.1%	0.0%	3.5%	0.0%	0.0%	9.0%
Fareham	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	1.3%	34.5%	6.4%
Southampton	0.4%	1.2%	4.4%	3.7%	0.0%	10.5%	5.8%	6.2%	3.5%
Other	7.3%	41.7%	31.5%	34.5%	14.7%	51.8%	21.0%	25.0%	25.4%
Outside District	12.8%	42.9%	36.8%	64.3%	14.7%	65.7%	28.1%	65.6%	44.3%
Don't know	9.1%	10.9%	5.9%	11.9%	4.7%	18.3%	18.1%	3.8%	9.9%

Source: Question 42, Household Telephone Interview Survey, Appendix B

8.29 The findings on habits for visiting pubs, bars and late night venues shows that Winchester Town is the main destination for this form of activity for respondents living in surrounding zones (i.e. Zones 1, 2, and 3), particularly Zone 1 (77.7%).

8.30 New Alresford is particularly popular with residents in the centre's constituent zone (Zone 5) where almost three quarters (74.3%) of respondents from Zone 5 (New Alresford) visit pubs, bars and late night venues in the town centre. Bishop's Waltham is popular with residents in the surrounding zone; attracting over a third (37.1%) of respondents from Zone 7.

8.31 Respondents from Zone 8 are more likely to visit pubs, bars and late night venues in Fareham Town Centre, followed by venues in Wickham and Whiteley.

8.32 Southampton is particularly popular with respondents living in Zone 6 (Upper Meon Valley), which is likely to be influenced by the proximity of the city compared to other zones in the Winchester District area.

8.33 Turning to the potential need for new F&B uses (floorspace), the table below shows that the total available study area expenditure for dining out in 2019 is £290.7m. The household survey has indicated that 52.9% of study area respondents prefer venues in the District for dining out. This could theoretically account for £153.76m of total study area expenditure, increasing to £193.40m by 2029 and £215.36m by 2036.

Table 8.7: Total Spend on Restaurants, Cafes, etc. (£m)

		2019	2024	2029	2034	2036	Growth 2019-2029		Growth 2019-2036	
Zone 1	Central Winchester	£73.7	£85.4	£96.6	£104.2	£106.7	£22.9	31.1%	£33.0	44.8%
Zone 2	North Winchester	£22.4	£26.0	£29.4	£31.7	£32.5	£7.0	31.1%	£10.0	44.8%
Zone 3	City South	£24.6	£28.5	£32.3	£34.8	£35.7	£7.7	31.1%	£11.0	44.8%
Zone 4	Eastleigh	£86.8	£96.0	£106.1	£116.5	£120.7	£19.4	22.3%	£33.9	39.1%
Zone 5	New Alresford	£14.9	£17.2	£19.5	£21.0	£21.5	£4.6	31.1%	£6.7	44.8%
Zone 6	Upper Meon Valley	£3.6	£3.7	£3.9	£4.1	£4.2	£0.3	9.1%	£0.6	16.0%
Zone 7	Bishop's Waltham	£16.0	£16.7	£17.5	£18.3	£18.6	£1.5	9.1%	£2.6	16.0%
Zone 8	Whiteley & Fareham	£48.7	£54.4	£60.3	£65.4	£67.3	£11.6	23.8%	£18.6	38.3%
Study Area Average		£290.7	£327.9	£365.6	£395.9	£407.1	£74.9	25.8%	£116.5	40.1%

Source: Appendix A10

8.34 There is no robust method for assessing forecast need for A3 and A4 floorspace. While residual expenditure for retail goods can be valued in floorspace terms using 'sales density' multiples, there is no such multiplier for F&B operators. For example, turnover values for restaurant and cafes are typically based on 'covers' (i.e. capacity based on the total number of customers that can be seated) rather than a sales turnover per sqm, while values for public houses and bars are more complex where they are largely based on accounting records.

8.35 Forecasts for expenditure on dining out clearly indicate growth in this sector, albeit much of this growth will account for inflation and will be absorbed by rising operational costs. An appropriate strategy should seek to maintain and, where appropriate, increase this market share over the period to 2029 and the longer term. However, given the slowdown in the F&B market caution should be applied to meeting potential need beyond a five year period. This could take the form of exploring alternative F&B options, particularly formats that are not yet provided for in Winchester. An obvious option is the 'foodhall' concept, discussed above, which would appeal to Winchester's student and young professional population in particular.

8.36 In compliance with the objectives of the NPPF, any forecast need should be directed to town centres within Winchester first to help increase competition and choice, and to help underpin their daytime/evening economies. However, the potential to support new A3 and A4 floorspace will principally be driven by operator interest, which will invariably gravitate to Winchester Town where there is strong demand from residents, students, and the visitor market. There is also likely to be demand from operators to support new A3 and A4 floorspace in Winchester's district centres, particularly for new restaurant and cafes. Theses uses are particularly important in supporting footfall in smaller centres where retail is becoming less viable.

8.37 Concern has been raised by some stakeholders consulted as part of this study that the centre has reached a saturation point regarding cafes and restaurants. Linked to this concern is a perception that the growth in café and restaurant provision is undermining the retail function of the primary shopping area. Demand for food and beverage offer is expected to continue as eating out has become an established and regular leisure activity; their growth becoming part of the process for town centre diversification. The review of retailer requirements in Section 5 confirms that there is outstanding interest from food and beverage providers to locate in Winchester Town so from a market perspective this suggest that there is still capacity. Rather than a blanket exemption on A3 and A4 uses within the primary shopping area, a better approach would be to consider changes of use of A1 uses on a case by case basis.

HEALTH AND FITNESS FACILITIES

8.38 Notwithstanding the impact of the economic downturn and Brexit on household incomes and confidence, the most recent research shows that the UK health and fitness industry is stronger than it has ever been as measured by number of gyms, membership and market value. The headlines for the 12 month period up to the end of March 2019 show:

- The number of fitness facilities in the UK increased from 7,038 to 7,239 this year (compared with 6,435 in 2016).
- Total membership grew by 4.7% to 10.4 million.
- Total market value increased by 4.2% to £5.1 billion up from £4.4bn in 2016.
- The UK penetration rate increased to 15.6%, up from 13.7% in 2015. In other words, one in every seven people in the UK has gym membership.

8.39 Gyms and health/fitness facilities make an important contribution to the health and well-being of the population across all age levels. The structure of the UK health and fitness industry has evolved significantly over the last decade to reflect changes in consumer choice and trends. The main operators in the health and fitness sector include:

Table 8.8: Main gym operators in the UK

Operator/Brand:	Outlets	Position	
Pure Gym	250+	Budget	Established in 2009. Acquired all gyms from LA Fitness in 2015. Most locations are open 24 hours and offer cardio equipment, fixed/free weights and exercise classes. No fixed contract and memberships vary by location and club, but average from circa £14.99/month.
Anytime Fitness	166	Budget	24-hour health and fitness club. Membership rates vary by club.
The Gym Group	159	Budget	Established in 2007. 24-hour access. No fixed contract and membership starts from £10.99/month.
Snap Fitness	123	Mid-Market	Established in 2003. A privately owned and operated club.
DW Sports Fitness	120	Mid-Market	Established in 2009 when Dave Whelan purchased the 50 JJB Sports Fitness Clubs and the attached retail stores for £83m.
David Lloyd Leisure	112	Premium	Established in 1982. Provide a family orientated, high quality fitness and leisure facility. Purchased by TDR Capital in 2013 for £750m.
Nuffield Health	111	Mid-Market	Acquired 35 Virgin Active clubs in 2016 at a reported cost of £80m. Membership rates vary by locations, but start from circa £60/month.
Energie Group	100+	Mid-Market	Established in 2003. The first club opened in Leighton Buzzard. Clubs are typically between 5,000-25,000 sqft and comprise a café/ lounge area, fitness area, studio, etc. Many include spa areas, swimming pool, treatment rooms and spinning studios.
Bannatyne's	70	Premium	Established in 1997. Expanded through the purchase of the LivingWell Premier Health club chain in 2006. Operates 37 spas and five hotels in UK.
Exercise4Less	50+	Budget	Gyms are mainly located in the Midlands and North. Gyms in South are in Hounslow, Harlow, Southend, Milton Keynes, Bath and Bristol. Differentiate from competition by offering a full boxing ring and combat classes. Membership starts from £9.99/month.
Virgin Active	43	Premium	Established in 1999 as part of Virgin Group. Acquired the Holmes Place Chain in 2006 and Esporta in 2011, increasing the UK business to 124 clubs. Subsequently sold 25 clubs to Nuffield Health in 2016 and 15 clubs to David Lloyd in 2017.
JD Gyms	39	Mid-Market	30 gyms were operating in Spring 2020. Nine others are scheduled to open. No contract and membership starts from £19.99/month.
Sports Direct	21	Mid-Market	Gyms in Glasgow, Cheltenham, Fareham, Guildford, Lincoln, Liverpool, Manchester and Rugby. Memberships starts from £9.99/month.
Fitspace	20	Boutique	A "*boutique concept*" which can operate in space ranging from 2,000-5,000 sqft.
Total Fitness	17	Mid-Market	Its 17 clubs are concentrated in northern England. Membership at any Total Fitness club allows access to any other Total Fitness club
Easygym	16	Budget	Plans to open 50 new gyms in London over the next 5 years. Their business model is based on franchise partners using the brand and operating sites. Membership fees vary by club and location, but start from £8.99/month outside London.
TruGym	12	Budget	Established in 2010 in Kent, where there are 4 gyms (Folkestone, Maidstone, Chatham and Bromley). It operates other gyms in Uxbridge, Luton, Peterborough and Boston, and its coverage extends to Stockton and Plymouth. No contract options. Membership starts from £14.99/mth
SimplyGym	11	Budget	Gyms in Bedford, Cheltenham, Coventry, Crewe, Kettering, Reading, Swindon, Walsall and Wrexham. Some gyms have spa areas, featuring saunas, steam rooms, aromatherapy and sun beds. No contract options and membership starts from £16.99/month.
Fitness4Less	9	Budget	Gyms in Bristol, Colchester, New Malden, Southwark, Worcester, Canning Town, Northampton, Watford and London Cambridge Heath. Gyms are fully staffed and include sauna/steam rooms. No contract options and memberships start from £15.99/month.
Gold's Gym	4	Specialist	Specialist American-owned gyms that specialise in cardio and strength training group exercise programs. Operate from London currently.

Source: Various

8.40 The value and budget gym operators have experienced the most significant growth in the sector in recent years. According to figures by Leisure DB budget gyms now account for over one-third of gym memberships in the UK. There has been a rapid expansion of budget gyms lead by the success of Pure Gym (not currently trading in Winchester) in 2007 and has seen many new entrants to this now crowded sector.

8.41 The growth of the budget gym operators has 'squeezed' the memberships and viability of some of the mid-market chains, such as LA Fitness and Fitness First. This has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap nor particularly exclusive will struggle to maintain market share in the competitive market place unless they revise their business models. Operators now compete against the "at-home fitness" revolution (e.g. Peloton), boutique studios and tech-enabled fitness; they will need to evolve to be more than "just gyms". As with trends in the retail sector, experiences and entertainment will be key to attracting and retaining customers.

8.42 In this context, the table below shows some of the main public and private gyms and leisure facilities in the District at the time of preparing this study.

Table 8.9: Winchester District – Key gyms and leisure facilities

Gym / Leisure Facility	Address	Commentary / Facilities
Winchester Town Centre:		
Anytime Fitness	Jewry Street	National gym operator. Memberships start at £37.95 per month.
New Energy Fitness	Middle Brook Street	Independent gym operator. Memberships start at £38 per month.
Orangetheory Fitness	Harman House, Andover Road	Premium boutique gym that specialises in group cardio work-outs using fixed bikes, rowers, and treadmills. Monthly memberships range from £100 to £150 per month, depending on the gym location (prices not available for Winchester).
Fitness In Time	City Road	Regional women only gym operator that provides. Also offers women only session times. Memberships circa £35 per month.
River Park Leisure Centre	Gordon Road	Council owned centre and managed by Places Leisure. Facilities include a gym, swimming pools, squash courts, tennis courts, soft play, studios, café, and function room. Membership or pay as you go available.
Winchester Racquets & Fitness	Bereweeke Road	Private club with a focus on tennis court provision and squash court provision. The centre also has a gym and café/bar.
Energie Fitness	The Brooks Shopping Centre	National budget gym operator. Memberships start at £27 per month.
Westgate Badminton Centre	Cheriton Road	Facility provides 5 badminton courts available on a 'pay per play' basis.
Winchester Boxing Club	Unit 1, Barfield Close	Boxing and fitness classes available for children and adults. Adult memberships start from £35 per month. 'Pay as you go' is available.
Wykeham Sports Club	Winchester College	Indoor sports facility that forms part of Winchester College. Public memberships are available for the fitness suite. A new sports centre is planned for development.
New Alresford:		
Evolution Health & Fitness	Perins School, Pound Hill	Small indoor gym that forms part of Perins School. Public memberships are available and start at £37 per month. 'Pay as you go' is available.
Other Locations		
Meon Valley Hotel, Golf & Country Club	Shedfield	Gym suite and pool facility that forms part of the hotel. Memberships are available to the public and start from £57 per month. Memberships for the golf club start at £800 per year.

Gym / Leisure Facility	Address	Commentary / Facilities
Norton Park Hotel	Sutton Scotney	Gym suite, pool and spa facility that forms part of the hotel. Information on membership fees was not available.
Swanmore Leisure	Swanmore College, Swanmore	Sports facility that forms part of Swanmore College. Public memberships are available for the fitness suite. On site sports pitches and outdoor racquet courts are available for hire. Information on membership fees was not available.
The Gym at The ANA Spa	Holiday Inn, Morn Hill	Gym suite and fitness studio that forms part of the hotel. Memberships are available to the public and start from £39 per month.

Source: Various

8.43 Gyms and leisure provision is focused in Winchester Town Centre, where the potential to support viable membership levels will be greater. It is noted that the District's smaller town centres, particularly Bishop's Waltham and Wickham do not have gym provision. Instead, health and fitness offer is mainly served by small fitness studios (e.g. Pilates, yoga, martial arts, etc.).

8.44 However it is noticeable that there are only two of the new 'wave' of 24-hr budget operated gyms highlighted in Table 8.8. There would therefore appear to be potential to accommodate more of these operators in Winchester Town Centre subject to market demand. This is confirmed by recent published market demand listings, which show a requirement from both Bannatyne and Snap Fitness for space in Winchester.

8.45 The results of the household survey provide a further layer of analysis to inform the robust assessment of current participation levels in the District and the market share of existing facilities, as well as any potential 'gaps' in provision. The survey indicated that 28.2% of the study area respondents visit a gym, health club, or sports facility. The table below illustrates the retention levels of the health and fitness facilities in Winchester, as well the trade leakage to locations outside the District:

Table 8.10: Market Share for Gyms and Fitness Facilities

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total Study Area	Study Area excl Eastleigh
Winchester Town	86.7%	75.8%	40.0%	3.0%	33.1%	51.5%	0.0%	0.0%	49.9%	37.3%
Whiteley	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	8.6%	1.9%	2.2%
District Centres	0.0%	0.0%	0.0%	1.2%	57.4%	12.2%	11.1%	9.5%	7.0%	5.4%
Smaller centres	1.7%	16.7%	2.4%	0.0%	2.4%	9.4%	5.5%	0.0%	3.5%	2.6%
Winchester District	88.5%	92.5%	42.4%	7.1%	92.9%	73.1%	16.7%	18.0%	62.3%	47.5%
Eastleigh	5.3%	7.5%	35.0%	73.8%	0.0%	0.0%	0.0%	0.0%	5.7%	24.3%
Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	63.5%	15.3%	11.2%
Southampton	0.7%	0.0%	10.8%	5.6%	0.0%	13.3%	17.4%	2.6%	4.2%	4.6%
Other	5.5%	0.0%	11.9%	13.5%	7.1%	13.6%	58.2%	15.9%	12.5%	12.3%
Outside District	11.5%	7.5%	57.6%	92.9%	7.1%	26.9%	83.3%	82.0%	37.7%	52.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Question 39, Household Telephone Interview Survey, Appendix B

8.46 The key findings are discussed below:

- Some 62.3% of respondents living in the study area normally visit gym, health club and sports facilities in Winchester District, which represents a reasonably strong retention level.
- Facilities in and around Winchester Town are popular with 49.9% of study area respondents.
- River Park Leisure Centre was identified as the most popular facility with 28% of study area respondents citing the venue as their preferred facility.

- The most popular venues outside of the District are located in Fareham, Eastleigh, and Southampton.

8.47 Winchester District's population is estimated to increase by +18,805 persons between 2019 and 2029. Assuming that a similar gym/health club participation level would apply to the new population as has been identified for the study area (i.e. 28.2%) this would equate 5,294 potential new gym members over the ten year period. Based on average membership levels for major gym operators (2,897 members) and budget gym operators (3,452 members), the uplift in the District's population over the ten year period to 2029 could support one to two new gyms. The same estimate applies over the entirety of the study period (2019 to 2036).

8.48 The delivery of new gym facilities will be dependent on market demand from operators seeking space in the District and its main centres. Winchester Sports and Leisure Park at Bar End (replacing the existing River Park Leisure Centre) is currently being developed and will include upgraded gym facilities and replacement swimming pool. Whilst this may attract new memberships there is still likely to be demand for niche/ boutique gym offerings in the District.

8.49 We are confident that there is market demand for new gym facilities, particularly around Winchester Town. As highlighted in the health check assessment for Winchester Town, there are recorded requirements from three gym operators (Buzz Gyms, Bannatyne's, and Snap Fitness) seeking space in the city. There is also potential to support new facilities within the boutique gym market, which relies on much smaller gym membership levels and are particularly popular with young professionals.

CINEMA PROVISION

8.50 The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of operators. Today the sector offer ranges from larger multiplexes, to smaller independent operators and 'pop up' screens in mixed-use venues. The table below sets out some of the main cinema operators in the UK.

Table 8.11: Main cinema operators in the UK

Operator/ Brand:	No. of Sites	Position	Description:
Cineworld	116	Multiplex	Established in 1995 and is now the leading cinema operator in the UK by box office market share (based on revenue).
Odeon/UCI	120	Multiplex	Established in 1930s. In July 2016, Terra Firma sold Odeon/UCI to the Chinese-owned AMC Entertainment group for £921m.
Vue	93	Multiplex	Established in 2003, following the acquisition of Warner Village for £250m. It has since grown through new development and acquisitions.
Showcase	19	Multiplex	Established in 1986. Owned by National Amusements Inc
Empire	14	Multiplex	Established in 2005 following the purchase of 11 former UCI and Odeon cinemas. Cineworld acquired 5 cinemas from Empire in 2016 for £94m, including the flagship cinema in Leicester Square.
Picturehouse (Cineworld)	25	Independent	Established in Oxford in 1989. Differentiated by its unique locations, homely atmosphere, art-house film choices and quirky features like lounge bars and rare snack options. Entire chain now owned by Cineworld.
Reel	10+	Independent	Established in 2001, following the purchase of Curzon in Loughborough. Independently owned and branded as Reel Cinemas Ltd in 2005.
Everyman	35	Independent	Established in 2000. Pitched at offering premium customer comforts.
The Light	9	Independent	Established in 2007. Small multi-screen operator that offers some premium cinema experiences, but at standard ticket prices.
Merlin	17	Independent	Established in 1990. Mainly one to six screen cinemas, with venues focused in Devon and Cornwall and in a small number of regional town centres across the UK.
Movie House	3	Multiplex	Established in 1990. Based in Northern Ireland and acquired the UGC (ex MGM/Virgin) multiplex in Belfast City Centre. Also owns two other multiplexes in Northern Ireland.
Curzon	13	Independent	Established in 1934. Operates 7 luxury 'art house' cinemas in London. Other cinemas in Canterbury, Colchester, Knutsford, Oxford, Ripon and Sheffield.
Savoy	5	Independent	Based in Nottingham and operates cinemas in the East Midlands: Nottingham, Boston, Worksop, Corby and Grantham.

Source: Various

8.51 Notwithstanding the greater variety and choice in the cinema sector, the three largest cinema operators still account for around 70% of total UK screens, and the six largest operators are collectively responsible for about 85% of the sector. Recent research shows the following key trends in the sector:

- UK box office receipts reached £1.28bn in 2018, which was +0.2% higher than in 2017.
- Total admissions in 2019 stood at 176.1 million.
- Admissions in 2019 were down from 2018 (177m), but higher than in 2017 (170.6m), 2016 (168.3m), 2015 (171.9m) and 2014 (157.5m).
- Total admissions in 2018 (177m) was the highest since 1970. Since records began in 1935 the lowest ever annual cinema admissions was in 1984, at just 54m.

- London accounted for 40m (22.6%) out of the 177m admissions recorded in 2018, followed by 21.7m (12.3%) for the South and South East, 21.3m (12%) for the Midlands, 17.5m (9.9%) for the North West and 15.3m (8.6%) for Yorkshire.
- Of the five major European Union (EU) territories, the UK was the only one that saw an increase in admissions compared with 2017. Attendances were down in France (-4.0%), Germany (-13.9%), Spain (-2.9%) and Italy (-7.0%).
- The number of cinemas has increased from 697 in 2006, to 801 in 2017 and 840 in 2019.
- The number of cinema screens has increased from 3,741 in 2010, to 4,150 in 2015, 4,264 in 2017 and 4,564 in 2019.
- Approximately three-quarters (78.2%) of the screens are in multiplexes.
- The average population per screen in 2019 was estimated to be 14,529.
- The average ticket price was £7.11, which is +21.7% higher than in 2010.

8.52 Although year-on-year admissions and box-office takings are notoriously volatile — driven as they are by the appeal of individual films and principally Hollywood 'blockbusters' — the long-term trend since the mid-1980s has been upward, and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10-20 years is even more impressive when one considers that this has occurred against the increase in new and sophisticated in-home entertainment, driven by new technology, choice and flexibility (including, for example, Sky, Netflix and Amazon)

8.53 As the competition in the sector has increased over recent years, cinema operators have responded by introducing changes to the cinema experience, through new innovations in technology, improvements to the auditoriums and the introduction of higher quality refreshments, alcohol and food. For example, Cineworld has installed 'DBOX' seats in selected cinemas, which 'react' to the film and provide a more immersive experience. Vue has also rolled out their innovative 'Evolution' concept in some cinemas, with luxury seating, beanbags and settees. Odeon has introduced their luxury 'Luxe' branding into a number of converted and new cinemas, beginning with East Kilbride in 2017, which has evolved into the opening in 2019 of its premium 'Luxe & Dine' concept in Islington, north London, which is specifically aimed at adults. Showcase also introduced their 'Cinema De Lux' branded multiplexes in 2014, beginning with the conversion of its cinema in Bluewater and including their cinema in Reading (Winnersh). This subsidiary brand puts emphasis on customer service, lush décor, high quality food and other high-end amenities. Some 13 other Showcase multiplexes have since upgraded to the Cinema de Lux brand.

8.54 There has also been a growth in smaller (Digital) cinemas serving smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry", as they do not require the large auditoriums needed to accommodate traditional projectors. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings, or as part of a mixed use offering. Other trends in the sector include the growth of 'pop-up' cinemas. Although there appears to be no reliable or recent data on the UK 'pop-up' cinema market, it is estimated that there were some 800-1,000 screenings in 2018, with 650+ screenings in London alone. Analysts estimate that the sector has a market value of circa £10m and has the potential to grow at between 20-25% per annum. Luna Cinema is the market leader and is reported to have achieved a turnover of around £3m in 2019 from around 175-200 screenings per year. Other niche operators in this space include Rooftop Film Club London, Backyard Cinema, Secret Cinema, Pop-up Screens and The Nomad Cinema.

8.55 The potential impact from Covid-19 has been highlighted by some cinema operators at time of reporting. Cineworld who operate under Cineworld and Picturehouse has raised concerns that the

Government's 'lockdown' response to containing the pandemic, which has resulted in the closure of all theatre venues, could lead to permanent venue closures due to lost revenue.

Existing Provision

8.56 Turning to the cinema provision in Winchester, the District supports one boutique cinema (Everyman) in the Winchester Town Centre and a multiplex (Cineworld) in Whiteley. The nearest competing cinema venues are located in Eastleigh (Vue), Andover (Odeon), and Basingstoke Town Centre (Vue) and Basingstoke Leisure Park (Odeon).

8.57 According to the results of the HTIS, 63.8% of all households in the study area visit a cinema, which confirms that this is a popular leisure activity. The most popular cinema venues cited by respondents are summarised in the table below:

Table 8.12: Study Area Market Share for Cinemas

	Study Area	Study Area excl Eastleigh
Everyman, Southgate Street, Winchester	14.5%	19.9%
Vue, Whiteley Shopping Centre	7.1%	9.1%
Vue, Swan Centre, Wells Place, Eastleigh	32.9%	22.0%
Reel Cinema, Fareham	9.6%	13.3%
Odeon, Port Way, Portsmouth	4.9%	6.6%

Source: Question 38, Household Telephone Interview Survey, Appendix B

8.58 The household survey identified that Everyman in Winchester and Vue Cinema in Eastleigh are the most popular cinema venues. Surprisingly, the Vue Cinema in Whiteley is not as popular as expected with respondents, although this particular venue is more popular with residents in Zone 8 (Whiteley & Fareham) where it is cited as the preferred cinema for 23% of respondents.

Future Need for New Cinema Provision

8.59 We have used a standard and widely accepted approach to assess the current level of cinema provision and future needs in the District area based on national and regional 'screen density' averages (i.e. the number of screens per unit of population). According to Dodona, in 2018, the UK average was 6.6 screens per 100,000 people (up from 6.1 screens in 2014) and the equivalent figure for the South East region is 7.4 screens per 100,000 people.

8.60 The table below shows the potential quantitative need for additional cinema screens in the District area, based on population growth.

Table 8.13: Indicative Capacity for New Cinema Screens

	2019	2029	2036
Population - Winchester City District	127,932	146,738	148,566
Screen density per 100,000 people	7.4	7.4	7.4
Screen potential	9.5	10.9	11.0
Existing screens	11	11	11
Indicative screen capacity	-1.5	-0.1	0.0

Note: Screen density for South East region.

8.61 The results of our assessment indicate that on applying an aspirational regional average screen density of 7.4 screens per 100,000 people against population projections over the next ten years there is no capacity to support new cinema screens.

8.62 However, in our judgement, cinema operators are still looking to expand their venue portfolios in the right locations; this demand is being generated by both the larger multiplexes (such as, for example, Vue and Cineworld) and the more ‘niche’ and specialist cinema operators. Whilst there may not be potential to support a new venue, there may be potential to expand or improve existing facilities, such as Cineworld Whiteley. However, there could be benefit in Winchester supporting a new multiplex within or close to the city centre, subject to market demand, which would serve a different market to the existing Everyman cinema.

8.63 As highlighted before, it is yet unknown how the COVID-19 pandemic and the resulting closures of cinemas as part of the UK Government’s response to containing the pandemic will impact on the cinema market.

GAMBLING

8.64 Gambling represents a significant component of the leisure industry. The main sectors of the gambling industry comprise ‘games of chance’, namely bingo clubs, casinos, betting shops and amusement arcades. The sector has experienced significant growth and dynamic structural changes over the last decade. The latest research figures show that the gambling industry in Great Britain generated a Gross Gambling Yield (GGY) for the year end to March 2019 of £14.4bn. This represented a +4.2% growth from the 2017 GGY of £13.8m. Remote (online) gambling accounted for £5.3bn of total GGY, equivalent to a market share of 37.1%, and the national lottery accounted for a further £3.1bn. The growth of remote and online gambling, alongside changes in regulations reducing maximum stakes for slot machines, has resulted in the fifth consecutive year of decline in betting premises and a -10% fall in the GGY of casinos to March 2019.

8.65 The following assesses the main trends in this sector, current provision in the District and the potential need/demand for new uses and facilities.

Bingo & Casinos

8.66 The latest statistics show that the Bingo sector achieved a total turnover of £1.03bn to year-end March 2019. Total turnover has fallen by almost 30% over the last decade, from £1.43bn in March 2009. The total number of licensed premises has also fallen from 710 in 2014 to 651 in 2019. Gala Leisure (129 premises) and Mecca Bingo (88 premises) are the leading operators in the UK and accounted for one-third (33%) of all premises in 2019.

8.67 In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new ‘app’ development. This forms part of a wider trend and growth in ‘remote/online’ gambling, which includes gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. At the opposite end of the scale, research shows that 55-64 age group has generated the biggest growth in online gambling as more mature bingo players switch to online bingo sites, as they grow in confidence with the new technology.

8.68 The latest figures published by the Gambling Commission show that casinos achieved a GYY of £1.059bn in the year end to March 2019. Although this was 10% down on GGY for 2018, there has been a circa 85% increase over the last decade from £751.1m in 2009.

8.69 Casino attendances in Great Britain were estimated to be 19.24 million in 2017/18, which was down on attendances in 2014 (20.99m) and 2015 (20.44m). The figures show that London casinos had the highest attendances (5.74m), followed by the North (5m), Midlands and Wales (3.72m), the South (3.18m) and Scotland (1,45m).

8.70 There were some 154 casinos in 2019 and the number of venues has increased steadily from 143 in 2009. The casino sector is dominated by two companies: the Rank Group with 67 venues has a 44% market share and Genting UK has 44 venues and a 29% market share. There has been some consolidation of the sector in the past few years, such as Rank Group's purchase of Gala Coral Casinos.

8.71 There are no casinos in Winchester, with the nearest commercial casino located in Southampton (Grosvenor and Genting). Any need for new casinos in the District will be driven by market demand from operators and at present it is our judgement that the town does not have the critical mass of uses or catchment to support a formal Casino offer. Where demand does arise over the plan period it should be directed to town centres first, principally Winchester Town Centre in this case, in line with national and local plan objectives.

8.72 The growth in online gambling and gaming is reflected by the fact that there are no dedicated bingo halls in Winchester, with the nearest venues located in Eastleigh (Leo Leisure Bingo Club) and Southampton (Mecca and Gala). The household survey confirmed that only 3.9% of households in the Study Area participate in Bingo or Casino as a leisure activity. An analysis the analysis of the HTIS responses found that only 3.9% of respondents in the study area partake in games of chance activities. The most popular destinations are venues in Eastleigh Town Centre (25.8%), particularly Brown Leisure bingo hall (6%), followed by venues in Winchester Town (11.1%) and Portsmouth (10.5%).

Betting Shops

8.73 There were some 8,320 betting shops in the UK in March 2019. William Hill accounts for 27% (2,264) of all premises, Ladbrokes has a 22% share (1,828 premises), Tote's market share is 19% (1,620) following its purchase of Betfred, and Gala Coral Group's share is 18% (1,529).

8.74 Regulatory changes in 2015 led to a fall in revenue and profit resulting in fall in the number of active premises from 9,111 in 2014. As gambling activities continue their shift to online channels, so the demand for physical outlets will inevitably dampen in the future and betting shops will inevitably close. Notwithstanding this, the presence of betting shops in high streets is a contentious issue in any case due to the perceived social and economic impacts on households. The Government has recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to 'Sui Generis'. This reclassification means local authorities have greater planning powers to manage the number of outlets and therefore greater potential to limit impacts.

8.75 Betting offices are only recorded in two of Winchester's centres. In the city centre, three outlets are recorded (two Coral outlets and one Betfred) and one outlet is recorded in Bishop's Waltham (Betting Ltd). No betting offices were recorded in New Alresford, Wickham and Whiteley.

8.76 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the town centres first in accordance with national and local plan policy. Given that current trends for bingos and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited.

FAMILY ENTERTAINMENT

8.77 Other commercial leisure facilities can be grouped together under ‘family entertainment venues’ (‘FEV’). These FEVs appeal to adults and children and established activities in the UK include tenpin bowling, roller skating, ice skating, and similar uses.

Tenpin Bowling

8.78 Tenpin bowling is possibly the most popular activity in the ‘family entertainment’ sector. After a period of decline in the 1970s, there are now 316 venues in the UK according to Mintel figures. The UK tenpin bowling market was valued at £285m in 2017. This represented a +9.7% year-on-year growth, and was higher than the +6.7% growth recorded in 2016. It also marked the fifth consecutive year of growth.

8.79 The growth of this sector has been largely fuelled by the development of large entertainment ‘boxes’ and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. The critical mass of leisure uses “under one roof” help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. The sector is evolving from old-style bowling alleys, to modern, multi-generational entertainment centres where bowling is blended with other forms of activity alongside an enhanced dining offer. Most of this market growth is being driven by the following two leading operators: **Hollywood Bowl** (operate 59 venues in the UK under the Hollywood Bowl, AMF and Bowlplex brands) and **Ten Entertainment** (operate 44 venues in the UK.

8.80 There are a number of other smaller independent and specialist operators in this sector, including All Star Lanes. The company offers a 1950’s American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, a small cinema and a venue for bands and live performers/comedy nights.

8.81 It is estimated that the 316 venues in the UK represents approximately four venues for every one million people, which compares with 13 per 1m in the USA. This implies that there is scope for additional capacity in the UK in the right locations, subject to market demand.

8.82 There are no ten-pin bowling venues in Winchester, with the closest facilities located in Basingstoke (Hollywood Bowl), Eastleigh (Hollywood Bowl), and Southampton (Tenpin). Given this is a growth sector, there may be demand to support a mainstream or boutique bowling venue in Winchester. From a viability perspective, bowling venues do not generate significant turnover and their appeal to investors require facilities to come forward as part of a mixed-use leisure scheme or extension to existing leisure facilities. There could be an opportunity to support a ten-pin bowling venue as part of the Central Winchester Regeneration scheme where it could sit alongside other potential leisure and food and beverage uses.

Ice Rinks

8.83 These range from permanents venues owned and operated by local authorities and/or the private sector, to temporary ice rinks in centres, retail outlets and leisure destinations normally over the Christmas period. These venues can help to generate new trips and increase footfall, dwell times and expenditure in centres to the benefits of other shops and businesses. The nearest venues to Winchester are **Planet Ice** outlets in Basingstoke and Gosport:

8.84 There is no dedicated ice rink in Winchester District, although temporary ice rinks have been introduced into the town centre as part of the annual Christmas market (Cathedral Ice Rink). This more informal ice rink provision should be maintained, as it helps to bolster trips to the town centre over Christmas and the New Year, particularly family trips. We are not aware of any plans or proposals to provide a permanent ice rink in, or on the edge of the town centre, or of any market demand for such a leisure facility.

Trampoline Parks

8.85 Since the opening of the first indoor parks in the UK in 2014, trampolining has become one of the UK's fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250-300 parks before saturation is potentially reached. This mirrors the growth in the United States and Australia, where parks first emerged in the early to mid-2000s. There are an estimated 800 venues in the US. The main operators in this sector include **Oxygen Freejumping** (nearest location is in Southampton), **Ryze**, and **Gravity Active Entertainment** (nearest is in Maidstone).

8.86 The public sector is also investing in this activity. For example, Eastbourne Borough Council, Waltham Forest Council and Tameside Metropolitan Borough Council in Manchester are just three of the many local authorities that have invested in indoor trampoline parks as part of their leisure provision. At Tameside, for example, the new Total Adrenaline trampoline park, which opened in November 2016, forms an important part of a £20m investment project that aims to get people more physically active.

8.87 Research shows that, on average, over one-third of "jumpers" are aged between 6-10 years and over one-quarter are aged between 11-15 years. These younger age groups require a parental guardian or authorised person for entry and, as a result, the trampoline venues are attracting wider families and groups, who are generating 'spin-off' expenditure to other uses and facilities both within and outside the venues.

8.88 In response to the broad range of "jumpers", not just the young, trampoline parks are increasingly offering a range of activities and experiences that cater to the needs of a broader demographic, including dodge-ball tournaments, rock-climbing, ninja courses, laser tag and other social events.

8.89 Winchester has no trampoline parks. The nearest facilities are located in Basingstoke (Atmosphere Trampoline Park) and Portsmouth (Oxygen Freejumping). We are not aware of any requirements from other trampoline operators for the District, although recent trends have seen trampolines introduced into vacant and repurposed shop units. This may represent a potential opportunity to "refresh" the offer in the town centre, such as within The Brooks Shopping Centre (subject to space requirements).

8.90 The assessment of published market demand from operators set out in Section 4 also highlighted potential interest from 'Inflata Nation', an inflatable theme park operator. They currently operate 13 indoor arena theme parks, including in Manchester, Cheshire, Birmingham, Beverley, Glasgow, Newcastle, West Bromwich and Peterborough. Each inflatable theme park comprises "bouncy activities" for all ages and abilities. The floorspace requirement ranges from 1,394 sqm to 2,787 sqm and with a minimum eaves height of 6 metres. They can potentially be accommodated in shopping centres and former trampoline parks.

Participation and Market Share in Family Entertainment

8.91 The results of the HTIS show that 23.7% of respondents from the study area partake in family friendly entertainment activities, such as tenpin bowling, skating, soft play, etc. The table below provides an indication of the most popular destinations and the retention levels of family attractions in Winchester, as well competing destinations outside the District.

Table 8.14 Market Share for Family Entertainment Facilities

	Study Area	Study Area exl Eastleigh (Zone 4)
Hollywood Bowl, The Swan Centre, Eastleigh	41%	33%
Hollywood Bowl, Basingstoke Leisure Park, Basingstoke	4%	6%
Hollywood Bowl, West Quay Shopping Centre, Southampton	4%	5%
Planet Ice, Arena Leisure Park, Basingstoke	3%	5%
Tenpin, Auckland Road, Southampton	4%	4%
Winchester City Centre	8%	11%
Eastleigh Town Centre	16%	9%

Source: Question 44, Household Telephone Interview Survey, Appendix B

8.92 As the table shows, Hollywood Bowl in Eastleigh Town Centre is by far the most popular family entertainment destination for respondents living in the study area. Even when Zone 4 is excluded the survey results show that the venue still remains a popular destination for those living in Winchester. Other Hollywood Bowl outlets in Basingstoke and Southampton were also cited as frequented destinations for family friendly activities.

8.93 No specific venues in Winchester were identified in the household survey in respect to family activities; instead the centre in general was highlighted by 8% of study area respondents as the preferred destination for such activities. It is noted that Marwell Zoo and the Science Centre were not identified by respondents to the household survey as family entertainment destinations.

8.94 The findings suggest a qualitative gap in provision for commercial family friendly activity venues, on the basis that there is limited provision in Winchester. Potential areas of investment could include a ten-pin bowling venue, which could form part of a multi-activity centre that offers various attractions under one roof (e.g. ice rink, soft play, cinema, etc.).

Cultural Activities

8.95 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment, consideration is given firstly to the provision of theatres and music venues, and secondly, historic/cultural attractions.

Theatres and Music Venues

8.96 Over half (54.2%) of all respondents to the HTIS that live in the study area answered that they visit theatre and music venues, which is a particularly strong participation rate for this activity.

8.97 The table below shows where respondents living in the Study Area go to visit theatres and music venues.

Table 8.15 Market Share for Theatre Venues

	Study Area	Study Area excl. Eastleigh (Zone 4)
Mayflower, Commercial Road, Southampton	35%	31%
Theatre Royal, Jewry Street, Winchester	14%	17%
Central London	16%	18%
Southampton City Centre	11%	8%
Chichester City Centre	7%	8%
Winchester City Centre	4%	6%
Chesil Theatre, Chesil Street, Winchester	1%	2%

Source: Question 40, Household Telephone Interview Survey, Appendix B

8.98 As the table above shows, despite the presence of two theatres in Winchester Town, residents in the District area are travelling out Winchester to visit theatre and music venues. The Mayflower Theatre in Southampton is the most popular destination for theatre performances, capturing around a third of all visits made by respondents in the study area. Venues in Central London and Chichester are also popular.

8.99 The results show that despite Winchester benefiting from a theatre, residents are still visiting facilities outside of the District. This may be influenced by the programme of events on offer at other theatres, such as the Mayflower in Southampton. Given the popularity of Winchester as a visitor destination there should be demand to support a new theatre facility that could complement the Theatre Royal and Chesil Theatre. Alternatively, there may be opportunity to improve the existing theatre venues to encourage better patronage. This could involve physical improvements or better marketing or an improved or more diverse events programme.

Historical and Cultural Attractions

8.100 The majority (52%) of respondents to the HTIS that live in the study area (52% or 55% excluding Eastleigh/ Zone 4) area visit museums, galleries and places of cultural or historical interest.

8.101 The most popular destinations highlighted by respondents for visiting museums, galleries and places of historical or cultural interest are summarised in the table below.

Table 8.16 Market Share for Historical and Cultural Attractions

	Study Area	Study Area excl. Eastleigh (Zone 4)
Central London	52%	55%
Winchester City Centre	18%	20%
Southampton City Centre	10%	5%
Portsmouth City Centre	7%	8%

Source: Question 41, Household Telephone Interview Survey, Appendix B

8.102 As the table above shows, historical and cultural attractions in London are particularly popular with respondents living within the study area (52% or 55% excluding Eastleigh/ Zone 4). More locally, Winchester Town was the second most popular destination according to study area respondents, followed by attractions in the cities of Southampton and Portsmouth.

8.103 It is not surprising that Winchester Town is a popular destination given the historic nature of the centre and its many heritage attractions that help attract some £5.4m[24] visitors to the city annually.

[24] Estimate for 2015. Source: Destination Management Plan (2015-2020), Winchester City Council.

HOTELS

8.104 Hotels fall under the planning Use Class C3 is considered by the NPPF as a town centre use.

8.105 Hotel provision in Winchester is strong, reflecting all year round demand from the visitor market. The table below provides a high level inventory of existing hotels and guest houses and their corresponding 'rating'.

Table 8.17 Existing Hotel and Guesthouse Provision in Winchester's Centres

Venue/Location	Accommodation Type	No. Bedrooms	Standard
Winchester Town			
Bridge Street House	Restaurant with rooms	6	Boutique
Giffard House	Guesthouse	13	5 star
Hotel du Vin	Hotel	24	Boutique
Mercure Wessex Hotel	Hotel	92	4 star
Premier Inn, Winnall Manor Road	Hotel	101	Budget
Travelodge	Hotel	62	Budget
The Old Vine	Hotel	6	Boutique
The Winchester Hotel & Spa	Hotel	96	4 star
Winchester Royal Hotel	Hotel	81	4 star
Wykeham Arms	Pub/Hotel	14	Boutique
Surrounding Area			
Days Inn Winchester M3	Hotel	50	Budget
Days Inn, Sutton Scotney North	Hotel	31	Budget
Days Inn, Sutton Scotney South	Hotel	40	Budget
Holiday Inn, Morn Hill	Hotel	141	4 star
Lainston House, Sparsholt	Hotel	50	5 star
Marwell Hotel	Hotel	68	3 star
The King's Head, Hursley	Pub/Hotel	8	Boutique
Whiteley			
Lodge at Solent	Hotel	54	3 star
Solent Hotel & Spa	Hotel	115	4 star
Bishop's Waltham			
The Crown Inn	Pub with rooms	2	3 star
New Alresford			
The Swan Hotel	Hotel	22	3 star
The Bell Inn	Pub with rooms	6	3 star
Wickham			
The Old House Hotel	Hotel	16	Boutique
Other			
Meon Valley Hotel & Country Club, Shedfield	Pub/Hotel	113	4 star
New Place, Shirrel Heath	Hotel	110	4 star
Norton Park	Hotel	165	4 star

Source: Hotel Fact Files (Winchester and Fareham/ Whiteley), July 2019, WCC; and LSH research. Star rating from various sources.

8.106 As the table shows, Winchester has a number of branded hotel chains. The most notable is Hotel du Vin, located on Southgate Street, which represents the hotel brand's first UK outlet. Much of the District's hotel and guest house accommodation is best described as mid-market where room prices range from £100 per night to £200 per night. Hotels offering budget/value accommodation are available including a number of well-known budget brands including Mercure, Days Inn and Holiday Inn. Budget hotel provision has been enhanced by the recent opening of Travelodge on High Street in Winchester Town.

8.107 Hotel provision is largely concentrated in and around Winchester Town. Accommodation serving the District's smaller centres is largely catered for by small independent hotels and guesthouses. Hotel and guesthouse provision is also recorded in smaller villages and rural locations.

8.108 Visitor accommodation across Winchester is also supported by a wide network of bed and breakfast venues. Visit Winchester, which promotes tourist information on the District, list 12 bed and breakfast in the District, but this does not include businesses that have not registered with the organisation or accommodation offered through short-lets (e.g. Airbnb).

8.109 The Winchester Hotel Fact File (July 2019) produced by the Council, provided an overview on occupancy levels and room revenue rates for most of the hotels identified in the above table for the years 2016, 2017 and 2018. The City Centre's 4-star and boutique hotels are achieving occupancy rates well above national averages, while average room occupancy for all hotels in the District as a whole is broadly in line with national averages for UK provinces.

8.110 Generally, the Winchester Hotel Fact File reported that hotel performance has been stable over the three years to 2018. The main area of investment identified in the Hotel Fact File is in the provision of '"*high-rated corporate business*" hotel provision, such as a hotel-conference facility. Given the good rail connections from London, we would anticipate that there would be investor and customer demand for such a facility.

8.111 In terms of demand, the Winchester Hotel Fact File records particularly high room occupancy rates for weekend nights, particularly on Saturdays (average for all hotel rooms in the District was 90% in 2018), followed by Friday nights (81%). Just over half of all hotel rooms are occupied on Sunday nights, with mid-week occupancy rates being relatively robust (74%). It is noted that weekend occupancy is strong all year round while mid-week occupancy is stronger in the seasonal months of the year (April to October).

8.112 The weekend market is without doubt a key driver of Winchester's hotel economy and as well as supporting visits to Winchester, the District's hotels are used as a base to visit other big attractions and events in the Southern Region. It is also noted that the weddings and functions account for 10-15% of weekend occupancy. Demand for mid-week hotel stays is largely supported by corporate demand, but notably it is generated from companies in Eastleigh, rather than from companies in Winchester. Other sources of mid-week demand are from those undertaking mid-week leisure breaks, cruise passengers, residential conferences, mid-week events, and during university graduation season.

8.113 In terms of future investment, we are aware that the Council is considering an application for a 94-bedroom Travelodge that will form part of a major mixed-use scheme at Solent Business Park. Given the site location, it is anticipated that the new hotel will largely serve business visitors and those visiting Whiteley, Fareham and those travelling to or from southern locations (e.g. Portsmouth, Southampton, etc.).

8.114 In terms of market interest in Winchester, we understand that Winchester Town Centre has sufficient market demand to support another 3*/4* branded hotel (e.g. Hamptons of Hilton) of circa 100-150 bedrooms that appeals to the mass market and subject to providing on-site car parking. There is unlikely to be demand for conference or banqueting facilities; instead investment should be aimed at increasing bed numbers where revenue potential is strongest rather than ancillary services (i.e. banqueting and conference facilities). Corporate provision is well catered for in Southampton and is likely to satisfy demand. Market demand will be limited for boutique or luxury hotel provision due low margins on cost versus profit. Existing boutique provision (Hotel du Vin and Lainston House) is expected to meet demand for the foreseeable future.

POTENTIAL IMPROVEMENTS

8.115 This sub-section considers the potential improvements that could be made to the leisure provision across Winchester District. The table below is taken from the HTIS, and sets out the top ten most cited suggested improvements made by respondents from the study area and their view on where in the District new investment should be directed to.

Table 8.18 Improvement Suggestions for Leisure Facilities in the Winchester District

	Study Area	Study Area excl. Eastleigh (Zone 4)
(Nothing)	59.6%	47.9%
A new multi-screen cinema	5.2%	4.5%
(Don't know)	5.1%	4.3%
A swimming pool	5.0%	4.9%
More for children	4.7%	4.7%
Ten-pin bowling	4.3%	4.5%
More local sports & recreation facilities	4.1%	4.5%

Source: Question 46, Household Telephone Interview Survey, Appendix B

Note: Percentages based on the total number of responses that provided a suggested improvement.

8.116 Overall, the results of the survey indicates that respondents living in the study area are satisfied with existing provision given that 'nothing' was the most frequent response given. Although, it is noted that respondents livening Zone 1 (Central Winchester) were less satisfied.

8.117 A new multi-screen cinema was the most frequently suggested improvement made by respondents living in the study area, particularly those living in Zones 1, 6 and 7.

8.118 Other suggested improvements that generated more than 4% of responses include 'a swimming pool', 'more for children', and 'ten pin bowling'. It is noted that the need for more facilities for children was particularly important to those living in Zone 1, while the suggestion for a new swimming pool in Winchester was more frequently cited by those living in Zones 2 and 5. The provision of a swimming pool within the Winchester Sports and Leisure Park development (replacing the swimming pool at River Park Leisure Centre) may satisfy the aspirations of those seeking a new swimming pool for the District.

ACCOMMODATING COMMERICAL LEISURE NEED

8.119 In terms of accommodating demand for new commercial leisure provision, market demand will be focused in Winchester Town Centre. **The Central Winchester Regeneration (CWR)** area has the physical space and market potential to address future need for new investment in commercial leisure uses. The CWR area SPD identifies 12,900 sqm (GEA) to 29,000 sqm (GEA) of floorspace to accommodate mixed commercial uses, which the SPD states at leisure and cultural/heritage uses (in addition to commercial and community uses). This could potentially support a new multiplex cinema, a multi-purpose arts and cultural venue, a 100-bed hotel, active leisure uses (e.g. family entertainment, gym, etc.), and ancillary F&B offer. It should be noted that market demand for a new cinema and hotel would be dependent on the provision of on-site car parking.

8.120 The **Brooks Shopping Centre** also provides the opportunity to support new commercial leisure uses, particularly the potential to repurpose vacant floorspace to support active leisure uses.

8.121 There appears to be limited physical capacity to provide further commercial leisure facilities at **Whiteley Shopping Centre**. However, it is possible that the centre owner could seek to repurpose existing retail uses for leisure uses; a trend that is emerging for shopping centres across the UK as asset owners seek to 'future proof' against further impacts within the retail sector.

8.122 For the **District's smaller centres** (Bishop's Waltham, New Alresford, and Wickham), existing town centre units are likely to meet demand for new commercial leisure provision, as and when town centre units become available.

8.123 There is likely to be interest in the future from developers seeking to develop new commercial leisure provision outwith the District's defined town centres, particularly opportunities edge and out of centre to Winchester Town. However, in compliance with national policy and support for town centre approach, new commercial leisure proposals should be focused in Winchester Town Centre as a priority followed by other the centres in the District's centre hierarchy.

8.124 It is unknown how the COVID-19 pandemic will impact on the commercial leisure market. The sector is expected to be badly impacted from the loss of custom during the period of 'lock down' and it is expected that many business that have closed with not reopen. This will particularly be the case within the F&B sector where many operators were already struggling. How the impact will apply to Winchester District is still unknown, but it may be the case that strong centres, such as Winchester Town will be in a better position than other centres, owing to its resident catchment and popularity as a visitor destination. The extent to which F&B businesses in Winchester can rebound will depend on a number of major factors such as the ability adapt to social-distancing requirements and the extent to which such measures will be in place, and Government support during such time. For Whiteley, its ability to weather the impact of COVID-19 will be dependent on how the centre owners can retain its operators in the face of lost revenue and rental income.

9. POLICY RECOMMENDATIONS

9.1 This section provides a summary of the key findings of the study relevant to plan-making and decision-taking in the Winchester District area and its centres. It specifically sets out high-level advice on how the Council can effectively plan for, manage and promote the vitality and viability of Winchester Town and other centres in the hierarchy over the development plan period.

9.2 Our advice is informed by the quantitative and qualitative need assessment for new town centre uses and in the context of national and development plan policy guidance, as well as other key material considerations. This includes the National Planning Policy Framework (NPPF) and the Planning Practice Guidance (PPG). Both place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out of centre locations.

9.3 This section sets out the recommendations for accommodating development for new retail, leisure, and other town centre uses in the District. Recommendations will consider:

- Where new development should be focused taking account of forecast retail capacity and gaps in leisure provision, demand from operators, and growth of online shopping;
- The need to maintain and/or change town centre offer for the District's main centres to ensure they function more sustainability;
- Potential changes to Primary Shopping Area boundaries for town centres;
- Identify an appropriate threshold for requiring a retail impact assessment for retail proposals that are edge or out of centre;

9.4 It is against this background that we set out below our main findings and recommendations to help inform plan-making in the District, specifically focusing on positive policies that will help with the management and potential growth of competitive town centres over the plan period in compliance with the NPPF.

TOWN CENTRE AND PRIMARY SHOPPING AREA BOUNDARIES

9.5 As highlighted in Section 5, the Government is bringing forward changes to the Use Class Order which will see the formation of a new and broad Class E from the 1st September 2020. It is intended to represent appropriate town centre uses and will allow sub-uses within this class to change from one to the other without the need for planning permission. Class E will include existing uses classes that are currently identified for retail (Class A1), financial and professional services (Class A2), -restaurants and cafes (Class A3); indoors sport, recreation and fitness facilities (Class D2), medical and health facilities, crèches and day nurseries (Class D1), , offices (Class B1a), research and development facilities (Class B1b), and light industrial uses (Class B1c).

9.6 The changes to the Use Class Order raise the question on whether Primary Shopping Areas and shopping frontage policies will still apply once the legislation comes into effect on 1st September 2020. As such, the advice set out as follows may need to be revised once the Government has provided further guidance on the new Use Class Order legislation.

9.7 A high level review has been undertaken of the town centre boundary and Primary Shopping Area (PSA) for Winchester Town, Whiteley, Bishop's Waltham, New Alresford, and Wickham. The review has taken account of where commercial activity is focused, the health of each centre, and forecast need for new retail and leisure floorspace. From this it can be identified whether there is a need to expand or contract a town centre boundary and/or a PSA. Consideration has also been given to the appropriateness of shopping frontages, particularly whether secondary frontages should still be applied.

9.8 In setting out policies for the management and growth of centres over the plan period, and promoting competitive town centre environments, local planning authorities are required by the NPPF (paragraph 85(b)) to define the extent of town centres and primary shopping areas and keep them under review (paragraph 85(d)).

9.9 The difference between the definition of the Primary Shopping Area and Town Centre Boundary is defined by NPPF (Glossary) as follows:

- **Primary Shopping Area (PSA)** – "The defined area where retail development is concentrated".
- **Town Centre Boundary (TCB)** – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.

9.10 The definition of a centre's PSA and TCB is important in retail planning terms in a number of important respects:

- First, for the purposes of plan-making and development management, sites and applications for new retail, leisure and other main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan will be subject to the sequential and impact 'tests' in accordance with the NPPF (paragraphs 86-89).
- Second, in terms of applying the sequential approach for both plan-making and decision-taking, an 'edge-of-centre' site is defined for retail purposes by the NPPF (Annex 2) as a location that is "well connected to, and 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" and preference should be given to "accessible sites that are well connected to the town centre" (NPPF, paragraph 87).
- Third, defining the extent of the PSA for town centres will also enable local planning authorities to manage Permitted Development Rights (PDR), principally from retail to residential use. PDR legislation refers to protecting the retail function of the 'Key Shopping Area'. Whilst there is no further definition of what a Key Shopping Area is, we must assume that it correlates with the NPPF's definition of the PSA. For smaller centres where there is no identified PSA, it would reasonable to assume that the TCB relates to the Key Shopping Area.

9.11 It is against this policy background and guidance that we have reviewed and identified the extent of the PSA, Town Centre Boundaries (TCB) and shopping frontages for the District's main centres. The table below sets out the rationale for any proposed changes to the centres' boundaries and shopping frontages.

Table: 9.1: Recommended changes to Existing Town Centre Boundaries, Primary Shopping Area, and Shopping Frontages.

Recommendation		Rationale
Winchester Town Centre		
TCB	No change.	The town centre boundary covers a broad area. Retail areas to the north west (Andover Road) should remain outside the main town centre boundary.
PSA	A revised proposals map should include PSF and SSF frontages <u>and</u> associated properties on High Street, Parchment Street, (nos. 71-81 (east side) and nos. 2a-8 (west side) The Square, Middle Brook Street (including Brooks Shopping Centre) Market Street, and Silver Hill. Draft provision should be in place to incorporate the CWRA.	Whilst the PSA should be guided on streets that are predominantly retail orientated, there is merit in including a broader area that includes secondary shopping streets. This provides policy protection against proposals for edge and out of centre proposals for town centre uses, which are required to consider sites and vacant premises within the PSA. Including the CWRA provides policy protection in relation to the sequential and impact test; particularly paragraph 89(a) of the NPPF.
PSF/ SSF	Remove PSF designation for Parchment Street and The Square. Contract the PSF on High Street to include nos. 105 to 156 (north side) and nos. 7 to 50 (south side). Also consider the removal of the PSF designation for the section of Silverhill that sits within the Central Winchester Regeneration Area.	Parchment Street, and sections of High Street, and on The Square have a broad mix of Use Class A1 and non-A1. They are not recognisable as a prime retail locations For Silver Hill, part of the street sits within the CWRA, which will be subject to total redevelopment and is expected to support a broad range of commercial uses at ground floor, rather than being retail-led. Generally, SSF designations would benefit from greater flexibility for town centre uses, which could help reduce shop vacancies on High Street and Parchment Street, in particular.
Whiteley Shopping Centre		
TCB	No change.	The current defined boundary covers the entirety of the shopping centre and its parking area. Areas beyond the boundary area comprise residential development or rural land. As such, there is no obvious potential to extend the defined town centre.
PSA	A PSA should be identified and this should include current PSFs and associated building footprint.	The shopping centre serves both a local and sub-regional shopping function. It is expected to serve the future population of North Whiteley. The exclusion of Tesco from the PSA will allow the Council the opportunity to assess any potential impact from potential future proposals to extend the foodstore.
PSF/ SSF	No change to PSF designation.	The mix of uses within the current PSF designation is predominantly A1 retail. We do not consider that SSF frontages are required.
Bishop's Waltham District Centre		
TCB	No change.	The current boundary remains appropriate and includes active frontages for a variety of town centre uses. No sites are identified at the edge of centre that would benefit from inclusion within the town centre boundary.

Recommendation		Rationale
PSA	A PSA boundary should be identified for the town centre. This should include current PSF frontage designations and their associated properties.	The town centre offers a good variety of retail uses, which are largely represented by independent businesses that would benefit from policy protection from edge or out of centre retail proposals.
PSF/ SSF	No change to PSF designation.	The current PSF designation covers all active commercial frontages in the town centre. Vacancies are limited. As such the current PSF designations appear to support a thriving and local town centre. We do not consider that SSF designations are required.
New Alresford District Centre		
TCB	No change.	The current boundary extends to a relatively broad area, extending southwards from High Street to include the rail station. As a result the boundary includes residential streets that would not usually form part of a town centre area. However, in this case it is logical to include the rail station given its relationship with the centre. At this current time there are no sites are identified at the edge of centre that would benefit from inclusion within the town centre boundary.
PSA	A PSA boundary should be identified for the town centre. This should include current PSF frontage designations and their associated properties.	The town centre offers a good variety of retail uses, which are largely represented by independent businesses that would benefit from policy protection from edge or out of centre retail proposals.
PSF/ SSF	No change to PSF designation.	The mix of uses within the current PSF designation is predominantly A1 retail. We do not consider that SSF frontages are required.
Wickham District Centre		
TCB	No change.	
PSA	A PSA boundary should be identified for the town centre. This should include current PSF frontage designations and their associated properties.	To provide policy protection to proposals for edge and out of centre developments.
PSF/ SSF	No change to PSF designation.	The town centre’s commercial activity area is very compact and the current designation reflects frontages on the High Street that primarily serve a retail function. We do not consider that SSF frontages are required.

9.12 No changes are recommended to the town centre boundaries of any of the District's assessed town centres. A PSA designation is currently only identified for Winchester Town Centre, and whilst not identified in the Proposals Map, it is defined in paragraph 6.3.16 of the LPP2 as including the primary and secondary frontages. We recommend that the PSA is defined on a proposals map to show the entirety of sites that make up the primary and secondary frontages. For the District's other centres, the PSFs that are currently identified effectively serve as the PSA for those centres. However, we consider that the PSA should be defined so that it provides policy protection to the entirety of the property associated with the relevant PSF. We do not consider that the identification of SSFs is required for the District's other centres given the size of these centres and the fact that the PSF will provide sufficient protection to support the retail function of the centres.

9.13 Restrictions on non-A1 uses within PSF frontages are set out in Policy DM8 (Primary Shopping Frontage) of the LPP2. Here policy only allows for the change of use from A1 uses in exceptional circumstances and subject to three criteria including:

- The proposal would improve the vitality and viability of that part of the town centre;
- The proposal will not undermine the retail function of the centre or disrupt the shopping pattern/ footfall of the centre, and will attract people to the centre; and
- No more than 20% of the defined frontage will be in non-A1 use within 25m of the development as a result of the proposal.

9.14 This policy wording remains appropriate should the recommendations on the PSF boundaries be applied. It will ensure that core retail frontages are preserved whilst allowing greater flexibility for market-led commercial uses in other shopping streets.

9.15 Policy WIN11 (Winnall) of the LPP2 also allows for town centre uses within the Winnall employment area, subject to evidence showing that an out of centre location is required and demonstrating the successful application of the sequential test. Winnall currently supports a number of traditional 'bulky' comparison retailers that are positioned along Easton Road. They mostly comprise fitted furniture showrooms (e.g. bath and kitchens) and DIY retailers and building merchants. A small number of retailers are identified that also typically trade from town centre locations. Whilst it would appear that Policy WIN11 is ensuring that retail offer in Winnall is limited to traditional bulky goods retailers, we have concerns that this policy may be weakened as demand for town centre retailing is impacted by increasing costs which will inevitably lead to increased interest in out of centre locations where development and rental costs are a lot less.

9.16 Therefore, we advise that any proposal for out of centre town centre uses, particularly for retail floorspace, are required to demonstrate impact where the proposal is above the recommended threshold, which is discussed next.

LOCAL IMPACT THRESHOLD

9.17 As described in Section 2, the revised National Planning Policy Framework (NPPF) requires an impact assessment to be undertaken for "retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan" (paragraph 89). The Framework states that local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. If there is no locally set threshold, then the NPPF default threshold of 2,500 square metres (gross) should be applied.

9.18 To help inform the setting of a locally appropriate impact threshold the Planning Practice Guidance (PPG) states that it will be important to consider the following:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

9.19 However, it is important to state at the outset that the threshold is not something that determines whether or not an application should be refused, only whether an application should be subject to an impact assessment. Furthermore, the PPG advocates that the level of information pertaining to the impact test (and the sequential test) provided in support of any application should be proportionate and considered in a locally appropriate way. We therefore advise the Council that they should pro-actively engage with any applicant at an early state in the pre-application process in terms of scoping and agreeing the level of supporting retail information required on a case-by-case basis.

9.20 Policy WT1 of the adopted Local Plan Part 1 requires an impact assessment for proposals for retail, leisure and office located outside the defined town centre boundary for Winchester Town where they go beyond 1,000 sqm gross. For the District's market towns and larger villages[25], the local threshold is set at 500 sqm gross (Policy MTRA2 LPP1).

9.21 It is noted that Policy DM7 of the LPP2 allows for proposals of up to 278 sqm gross of new retail floorspace that are outside a defined town centre boundary, but with the purpose of serving the retail needs of the immediate locality. This threshold would allow the operation of smaller convenience facilities that are exempt from Sunday trading laws.

9.22 We consider that thresholds supported in Policy WT1 for Winchester Town and the other centres could be lowered. As they currently stand, the threshold levels do not prevent the incremental growth of smaller retail and leisure developments. Section 3 of this report highlights how growth in the grocery market is now focused on Limited Assortment Discounter store openings, but also the expansion of 'local' format stores by mainstream grocers (e.g. Sainsbury's Local, Tesco Express, M&S Simply Food, Little Waitrose, etc.). Most 'local' format supermarkets fall under the 500 sqm threshold that currently applies to market towns and larger villages, whilst M&S Simply Food and Co-op are opening stores that are under 1,000 sqm gross.

9.23 In terms of proposals for comparison retail floorspace, the current thresholds will mostly apply to new retail park proposals or applications to extend existing facilitates, albeit where the proposal is for 1,000 sqm gross or more. The existing thresholds do not allow the Council the opportunity to identify impact associated with incremental increases to existing facilities or the change of use or applications to vary conditions on individual units within a retail park. The latter is of particular relevance as retail park asset owners seek to remove restrictions on the sale of retail goods. Retail parks typically include units that fall under 1,000 sqm and a review of the accommodation schedules for a sample of retail parks confirms this[26].

9.24 We consider that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 350 sqm gross and above at sites defined as edge or out of centre to

[25] Local Plan Part 1 Policy MTRA 2 identifies Bishop's Waltham, New Alresford, Wickham as 'Market Towns' and 'Larger Villages' include Colden Common, Denmead, Kings Worthy, Swanmore, Waltham Chase, and Wickham.

[26] LSH research informed by Experian Goad data.

demonstrate that they will not have a significant adverse impact cumulatively with other commitments in the area, in accordance with the NPPF. This will ensure that proposals for smaller stores and applications to incrementally expand existing edge and out of centre retail offer are appropriately assessed in terms of their potential impact on existing centres. The proposed threshold would capture proposals that seek to incrementally expand out of centre retail offer. This would also include applications that seek to vary conditions that restrict the sale of goods (e.g. bulky goods) on say retail parks, to allow a broader range of goods for sale, which could impact on existing centres. The proposed 350 sqm threshold would allow for small scale retail provision (e.g. a small convenience store) to come forward without the need for an impact assessment, particularly where it will serve a new or existing local community.

9.25 The proposed threshold should apply across the District area. This will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre retail floorspace proposals (also applying to change of use applications and applications seeking variations of conditions) on all town centres (as defined by the NPPF) in the District area.

9.26 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications. Setting a lower impact threshold in this case will provide the local planning authority with the flexibility, as decision-taker, to assess whether an RIA is needed on a case by case basis.

REVIEW OF CENTRE HIERARCHY

9.27 Policy DS1 of the LPP1 sets out the centre hierarchy for the District which is reviewed in Section 2 of this report. We have considered whether there is a need to adjust the position of the District's main centres to take account of key findings from previous stages of the study.

9.28 The District's centres are on the whole fulfilling their respective roles in the hierarchy. The only notable difference in role and function was for Weeke Local Centre. Due to the presence of two foodstores (Waitrose and Aldi), Weeke is commanding a much wider convenience goods retail catchment than many other centres, including Bishop's Waltham, New Alresford and Wickham. However, its catchment potential is limited to convenience and the rest of the centre's offer compares to other local centres in the District. The role of the Weeke Local Centre should be considered in the future and once residential communities are established at nearby Barton Farm.

9.29 We do not consider that any changes are required to the current hierarchy, with the exception of allowing for the allocation of new local centres that will form part of emerging housing allocations (e.g. Barton Farm and North Whiteley).

10. TOWN CENTRE STRATEGY RECOMMENDATIONS

10.1 This final section provides a high-level advice on how the Council can effectively plan for, manage and promote the vitality and viability of Winchester's main centres and opportunities to promote the town centre economies over the development plan period. Our advice takes account of the findings set out in the previous sections, particularly the SWOT analysis for each centre, forecast population projections and retail capacity, market demand for retail and leisure operators, and against the backdrop of the current and emerging economic landscape.

10.2 The impact of COVID-19 on town centres and how to respond to it will be one of the most pressing challenges for local authorities in the short term. At the time of finalising this study the UK has been in the midst of a 'lock down' which has effectively resulted in the closure of town centres. It is too early to predict the form and scale of impact, but for now we can speculate that lockdown measures will hasten the demise of town centre businesses that were already struggling. It is very possible that the UK will suffer a deep but relatively short recession which poses an existential threat to the traditional town centre model. It is possible that new shopping patterns in particular may emerge as customers have been forced to increase their reliance on online shopping, or it could spark a greater appreciation for shopping locally. Either way, the diversification of town centres will be part of the solution, which in the future could see centres respond quickly to major economic impacts, but also evolving customer and market trends.

10.3 The Government's planned changes to the Use Class Order which will come into effect from the 1st September 2020 creates a new Use Class (Class E) that covers a very broad range of commercial uses. The Government's aim in creating the new Class E is make it easier for landlords and businesses to respond quickly to market changes and minimise vacancies. There is merit in promoting flexibility across commercial town centre uses, particularly in respect to re-occupying vacant units. However, allowing the introduction of non-retail uses without any restrictions could undermine the retail function in parts of town centres. This will be an important consideration in preparing a strategy for the District's town centres.

WINCHESTER TOWN CENTRE

10.4 A review of Winchester Town Centre confirms that the town is a unique and thriving centre that boasts a good range of quality high street and independent retailers, but also a very strong offer in food and beverage and other commercial leisure uses.

10.5 The town centre's retail offer is performing well based the range and quality of brands available and low vacancies, which serve as good indicators for retailer demand in a town centre. Although, retail is largely focused on prime shopping streets; principally the High Street, the performance of retail in secondary retail locations is more varied but serves an important role in offering more affordable accommodation for independent businesses. Discussions with retail agents indicate that the centre remains an attractive location for new retailers. There has been a healthy level of 'churn' on prime retail streets that has seen ailing retail brands exit retail units, but with a minimum vacancy period in between new lettings.

10.6 The role of food and beverage (F&B) offer has become considerably stronger in the centre, which is reflective of changing consumer habits; specifically continued demand for dining and drinking out. There are concerns that F&B provision has reached saturation levels for the town centre, but evidence from published operator requirements indicates that Winchester is still considered a key area for F&B investment. This is likely to be driven by catchment demographics (i.e. an affluent population with greater disposable income) and the centre's attraction as a visitor destination.

10.7 Population projections based on the Council's housing trajectory identify a ten year need (up to 2029) for up to 3,288 sqm of new retail (convenience and comparison goods) net sales floorspace for the District as a whole; or 2,762 sqm if prime pitch vacant retail floorspace in Winchester Town is reoccupied. The majority of this retail need is generated by existing convenience and comparison goods retail floorspace in Winchester Town (2,122 sqm net by 2029 or 1,596 sqm net excluding vacant floorspace).

10.8 Key areas for investment and accommodating forecast need for new town centre uses:

- The **Central Winchester Regeneration area** will be the most important investment vehicle for the town. Its delivery has the potential to help diversify the town centre's offer, particularly to pursue an option that is focused on the delivery of residential, retail, cultural and leisure uses. It is anticipated that much of the forecast demand for new retail floorspace identified for Winchester Town Centre will be accommodated within the CWR area. Unlocking constraints to the delivery of a masterplan and planning permission will be key to broadening the town centre's appeal to residents and visitors. The CWR area provides the opportunity to increase the town centre's residential population which will support local businesses as well as financially enabling the delivery of a mixed use scheme.
- The **Brooks Shopping Centre** appears to be under-performing based on the current number of vacancies in the centre. However, we understand that a number of key brand tenants are expected to take up space in the centre. The centre has what we consider to be a dated aesthetic and offers limited external frontage, thereby giving the impression that the centre (and its retailers) are off the main retail pitch. However, the centre's main advantage is that it offers larger floorplates, which are in relative short supply in the rest of the town centre. For the centre's smaller vacant units, greater flexibility in the permitted uses or the provision of temporary uses could encourage their re-occupation. In the longer term, the centre could benefit from diversification into more niche retail and leisure offering or a complete redevelopment programme that includes residential uses on upper floors.

10.9 Winchester Town Centre has the potential to support the growing popularity of niche/alternative niche retail and leisure industries. Examples includes creative markets that promote maker space for craft and design industries and also food market halls that typically offer an eclectic mix of independent F&B outlets with shared seating areas. These alternative retail and leisure concepts appeal to student and young adult demographics and could form part of proposals coming forward for the Central Winchester Regeneration Area or the potential to diversify the offer at the Brooks Shopping Centre should the opportunity arise to repurpose vacancies in the centre.

10.10 In summary, the development of a strategy for the town centre should focus the following key themes:

- ***Diversification of town centre uses*** - help mitigate against future impacts on the retail sector. At the same time, caution should be applied to relying on the leisure sector for growth. Trends point to increasing demand for experience-led commercial uses, such as creative markets, foodhalls, and state of the art entertainment venues (e.g. new generation cinema multiplexes).
- ***Greater flexibility of uses*** – revisions to the Primary Shopping Area and Primary Shopping Frontages aimed at strengthening Winchester Town's core shopping area and allowing greater flexibility for alternative and market-led uses in secondary shopping streets.
- ***Central Winchester Regeneration Area –*** delivery of the CWR Masterplan will be key in driving change for Winchester Town and providing the opportunity to increase residential living and potentially accommodate new commercial leisure. The scheme is expected to accommodate all or the majority of forecast need for new retail development in the District up to 2029.
- ***Increased residential living*** - the densification of residential uses in town centres is vital to sustaining economic growth and Winchester is no exception. The potential for upper floor

residential conversions and airspace development for residential uses should be explored where it is feasible and does not conflict with the town's heritage assets.

- ***Digital infrastructure and training*** – investment in 5G wireless communication infrastructure is essential for retaining and attracting the local workforce and ensuring that Winchester can compete with other sub-regional centres. Work practices are likely to change post COVID-19 which could lead to more remote working for staff and the need for businesses, particularly retailers, to have a greater online presence.

10.11 A short term strategy for the town centre will need to address the likely impact from COVID-19. The temporary closures of shops and leisure outlets as a result of the Government's imposed 'lockdown' could lead to further vacancies in the town centre as businesses collapse from the loss of trade. There will be a greater urgency in the need to diversify town centre offer and promote flexibility uses in particular.

WHITELEY

10.12 Whiteley's role and function has changed since the centre was first built as a purpose built shopping centre that served the retail outlet market. The centre's retail offer has broadened following redevelopment to reflect a broad comparison retail offer; supported by major high street brands. Owing to residential development that has taken place in the area over the years the centre now serves a more local function.

10.13 However, it is evident from the market share assessment that the centre targets a much broader catchment. The diversity of uses on offer is largely supported by comparison retail and supporting leisure uses, which reflect the typical range of uses for purpose built shopping centres and retail parks. The centre provides most of the main town centre uses defined in the NPPF (Glossary – Main Town Centre Uses), albeit a limited offer for A2/ financial and business service provision. However, Whiteley lacks the broader non-commercial town centre uses that help to encourage linked trips and meet wider community needs (e.g. civic uses and community uses).

10.14 With new residential development taking place at North Whiteley (+3,500 homes), demand for commercial and non-commercial town centre uses in Whiteley is expected to increase. Opportunities to expand the centre's offer to support broader town centre uses should be explored with the centre owners. However, it is likely that there will be resistance to non-commercial uses being included within the centre complex due to lower rental values achieved from community and civic uses.

10.15 There are obvious physical constraints to expanding the town centre. There may be opportunity for 'air space' development, which could support lower value non-commercial uses or alternative uses such as office and residential uses. Development on existing car parking areas is unlikely to be suitable where it could reduce capacity, particularly as traffic congestion is perceived as an issue by those living locally (Table 5.13, Section 5).

10.16 Investment in commercial uses should focus on providing more retail services and financial and business services, which are under-provided for when compared to other town centres. However, as highlighted in respect to non-commercial town centre uses, such uses may not meet the target uses intended by the centre's owners.

10.17 The retail capacity forecasts very limited need for new retail floorspace in Whiteley. However, in reality, the strong presence of high street retail brands and major leisure operators in the centre will ensure that Whiteley remains an attractive location to operators. There is likely to be demand for additional retail floorspace at the centre. Similarly, there is also likely to be demand for further commercial leisure provision, particularly popular F&B operators and active leisure uses that can capitalise on custom to existing leisure attractions (e.g. cinema, rock-climbing centre, and leisure centre).

10.18 In summary, any strategy going forward for Whiteley should explore the potential to broaden the range of town centre uses that appeal to the local community, particularly future residents of North Whiteley. This will require 'buy-in' from the centre owners and a strategy that ensures that the commercial viability of the centre is not comprised.

BISHOP'S WALTHAM

10.19 Bishop's Waltham has a typical range of town centre uses, as expected for the role and function of a smaller order town centre. The centre's retail and town centre offer is largely operated by independent retailers and businesses from smaller units in historic buildings.

10.20 Comparison retail provision is under-provided for when compared to UK averages, but this is also indicative of the centre serving a bigger role as a convenience shopping destination for the surrounding population. As with Winchester's other district centres, the centre does not benefit from a large supermarket and as a result, local expenditure is being lost to major foodstores closer to Fareham, Hedge End and Waterlooville.

10.21 There is also a below average representation of places for eating and drinking out, while in contrast the town centre supports a very good provision of financial and business services.

10.22 The retail capacity forecasts indicate that there is no need for new comparison good floorspace and limited need for convenience floorspace. This is mainly due to low projections in population growth over the assessment period and what little expenditure is generated will be absorbed by the rising costs of retailers. Given retailers and leisure operators are focusing investment in successful higher order centres, such as Winchester Town, it is unlikely there will be underlying market demand to support new retail and leisure floorspace in the town centre.

10.23 In terms of a strategy for the town centre, the main objective should be to support existing town centre uses rather than seek to expand physical floorspace. Smaller centres, such as Bishop's Waltham will be more vulnerable to further changes in the retail and leisure market. Therefore, policy should consider the potential to allow greater flexibility for town centre uses, but without compromising the retail function of the Primary Shopping Area.

10.24 The centre's environment was considered by most respondents to the household survey as the attribute they liked most about the town centre (Table 6.2, Section 6). Therefore, maintaining the physical environment will be important for retaining and attracting customers and town centre operators.

10.25 Options to improve parking capacity in the town centre should be explored as this appears to be the main town centre issue raised by respondents to the household survey who live locally. A lack of suitable sites to accommodate increased parking may be a barrier. Encouraging short stay parking may allow for more trips without the need for increasing parking capacity. In addition, investment in improving pedestrian links to the town centre from residential communities outside the centre could reduce the reliance on car travel and encourage more residents to walk or cycle to the town centre.

NEW ALRESFORD

10.26 New Alresford provides a good mix of retail and town centre uses for its local catchment, despite the relative proximity of Winchester. As typical for Winchester's district centres, retail and town centre uses are characterised in smaller units located in historic buildings. The diversity of uses reflects the UK average in terms of mix; the only exception being an under provision of financial and business service offer. Unlike many other smaller order town centres, New Alresford has strong comparison retail offer, which is likely to be supported by the centre's popularity with visitors. Restaurants and cafes are well catered for, which will also be influenced by visitor spend in the area.

10.27 The centre is not reliant on national multiples and supports a good range and mix of independent retailers and leisure businesses. Policies that encourage and support independent businesses should form part of any future strategy for the town centre. In addition to this, the potential to allow flexible commercial uses should the town centre be impacted from changes in the retail and leisure market. The potential to allow flexible uses should be managed in a way that protects the strong retail function of the town centre.

10.28 Maintaining the physical environment of the town centre will be important in retaining and attracting customers and town centre operators. Similarly to Bishop's Waltham, the household survey revealed that respondents overwhelmingly highlighted the attractiveness of New Alresford as the attribute they liked most about the centre.

10.29 There is no capacity identified over the assessment period to 2036 to support new retail development. Whilst there is no capacity to support new convenience floorspace in New Alresford, there could be potential to improve the existing foodstore offer, which could claw back expenditure currently lost to Winchester's out of centre foodstores and foodstores in Alton.

10.30 Parking capacity is considered by household survey respondents as the most important area for improvement for the town centre. However, a proposed new car park at The Dean may alleviate some of the pressure for parking in the town centre and ensure that residents and visitors are not discouraged from using the town centre.

WICKHAM

10.31 Wickham is the smallest of Winchester's district centres and serves a very localised catchment, due in part to competition from nearby higher order centres, particularly Fareham. The centre has a strong independent retail and service offer, and has built a reputation for antiques / collectibles.

10.32 Convenience and retail offer serves a very localised catchment and largely supports day to day shopping needs. The market share analysis of the household survey shows that residents in the locality are carrying out their main food shopping at large foodstores in Fareham and Hedge End.

10.33 As a result there is no forecast capacity to support new retail floorspace. From a market demand perspective there is unlikely to be sufficient catchment demand to improve the scale of provision, such as a foodstore, given the proximity of foodstores in higher order centres. Given the size of the centre there is also no capacity to support new comparison floorspace over the forecast period. That said, opportunities to build on the centre's niche retail offer should be encouraged as it helps to distinguish Wickham from other centres in the District and is likely to help draw visitors to the centre.

10.34 A new district centre will form part of the development of Welborne Garden Village (6,500 new homes); to be located some 2 miles south of Wickham. This new centre could either complement existing local service provision in Wickham or undermine the centre's function by drawing retained expenditure to new town centre uses in Welborne Garden Village.

10.35 In response, the Council should take a protective response to ensuring that existing levels of expenditure retention are maintained for Wickham. With no capacity to enhance town centre provision, measures could take the form of maintaining or enhancing the attractiveness of the town centre.

10.36 There may be benefit in exploring opportunities to promote additional events in the town centre, specifically on The Square. This could include monthly farmers'/ food orientated markets or specialist non-food markets (e.g. antiques/collectables). Events on the square would be subject to providing alternative parking arrangements.

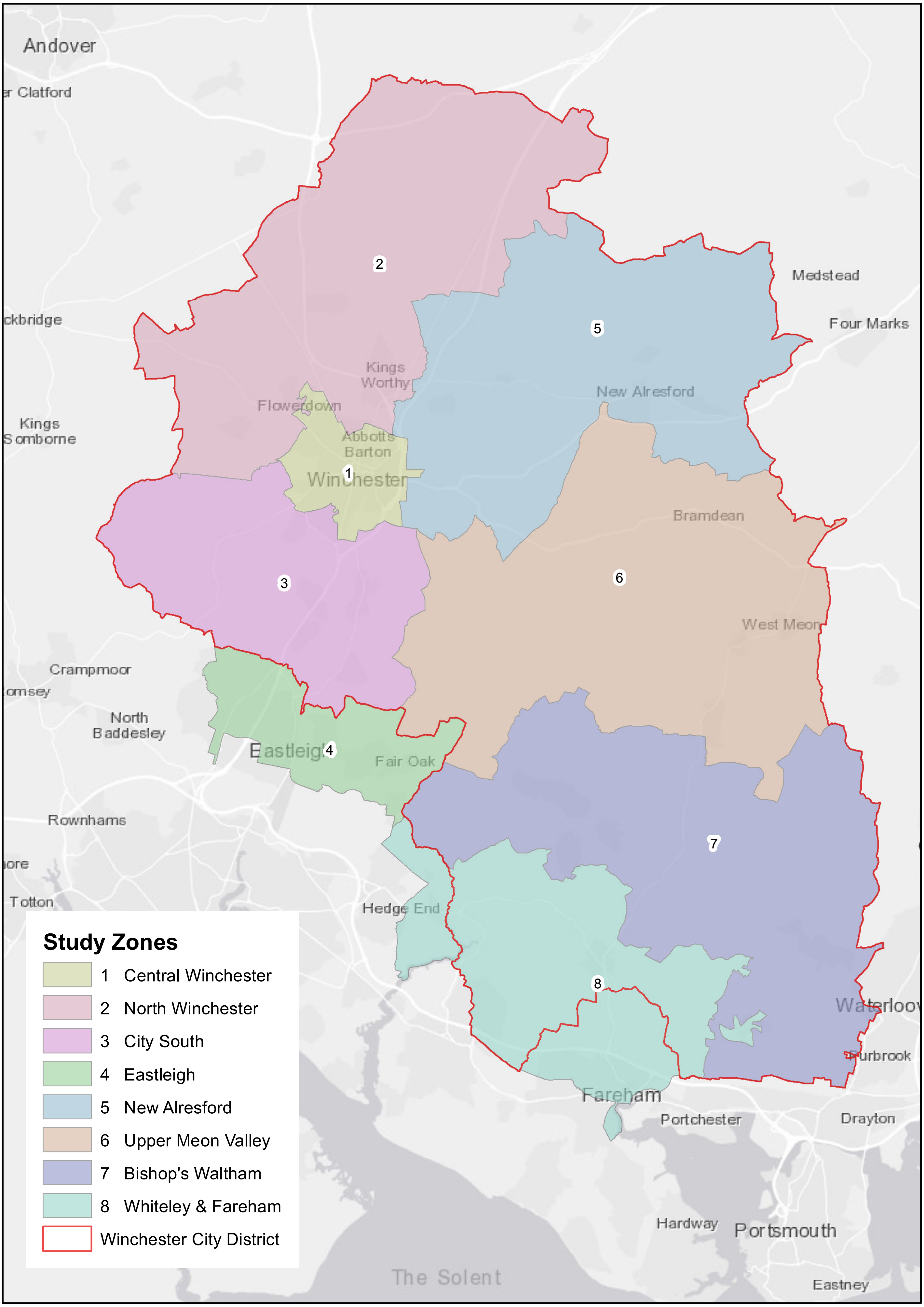
------- End -------

Lambert Smith Hampton

Appendix A

1. Study Area

Study Area Plan



2. Health Check Methodology

Town Centre Health Checks: Methodology

1. Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

2. In accordance with the PPG (Paragraph: 006 Reference ID: 2b-006-20190722), there are a number of key performance indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. These include:
   - the diversity of uses (e.g. retail and services offer);
   - proportion of vacant street level property;
   - commercial yields on non-domestic property;
   - customers' views and behaviour;
   - retailer representation and intentions to change representation;
   - commercial rents;
   - pedestrian flows;
   - accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements;
   - perception of safety and occurrence of crime;
   - state of town centre environmental quality;
   - balance between independent and multiple stores
   - extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
   - opening hours/availability/extent to which there is an evening and night time economy offer.

3. In this case the most reliable KPIs have been gathered (where possible) for the centres to help inform the assessment of their overall strengths and weaknesses in in terms of their retail and leisure provision, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability. We have referred to a number of datasets and research to help assess the relative vitality and viability of the centres, as referenced throughout the report.

4. The general methodology is for the health check assessments is set out below:

Retail Composition & Diversity of Uses

5. The town centre health check assessments have been informed by unit survey data provided by the Council for different town centre use categories located within the defined town centre boundary. Town centre use categories include convenience goods retail, comparison goods retail, services and vacancies. It should be noted that 'services' include : retail services (Class A1 and certain sui generis uses such as hairdressers, beauty salons, travel agents, launderettes, opticians, etc.); leisure services (comprising Class A3 cafés and restaurants, betting shops (sui generis) and Class A5fast food/ takeaway outlets); and financial and professional services (including Class A2 uses such as banks, estate agents, etc).

6. The health checks provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres. This is based on benchmarking against Experian Goad UK averages for all circa 2,000 centres and shopping locations.

Vacancies

7. The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents a KPI to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of retailer demand and/or the fact that vacant units are not meeting demand and are not 'fit-for-purpose'. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with care.

Multiple and Independent Retailers

8. A multiple is defined by Experian Goad as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.

Street/Covered Markets

9. Whether or not a centre has a market, and the quality and offer of a market, can give an indication as to whether a centre is vital and viable. Information regarding the health of the markets discussed in this report has been obtained from our own research and observations of the centres, as well as stakeholder consultation. In line with Paragraph 85(c) of the NPPF, existing markets should be retained and enhanced and, where appropriate, reintroduced or new ones created, ensuring that markets remain attractive and competitive.

Retailer Demands & Requirements

10. Evidence of requirements ('market demand') from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case we have drawn on standard published sources to inform our assessment of current market demand; including CoStar and the Requirements List. However, it should be noted that this published information is not definitive, as many retailers and leisure operators prefer not to announce their requirements as it can undermine their negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven; for example in response to the marketing of new development and regeneration initiatives.

Commercial Rents: Prime Zone A Retail Rents

11. The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents and yields are not available for all centres, particularly smaller centres where there are more limited transactions.

Customer Views and Behaviour

12. Our assessment of customers' views and behaviours draws on the findings of the household survey. The household survey comprised 1,000 interviews across a defined study that asked specific

questions on what respondents like and dislike about Winchester Town, Whiteley, Bishop's Waltham and New Alresford. The findings for Winchester Town were supplemented by a face-to-face interviews in the town centre to understand how shoppers and visitors use the town centre and were improvements should be made to encourage more visits.

Environmental Quality

13. Environmental quality is an important KPI to help assess a centre's overall vitality and viability. An assessment of environmental quality (including cleanliness and attractiveness, security, treatment of buildings and open spaces) has been undertaken using our own research and observations of the centres.

Accessibility

14. A centre's vitality and viability can also be impacted by the ease of accessibility by different modes of travel, and the level and quality of car parking. This assessment has been informed by our observations of how easy a centre is to access; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes.

Pedestrian Flow

15. Evidence on pedestrian flow can indicate how busy a town centre is and typically, activity is strongest within the retail core or around foodstore locations. Pedestrian counts were obtained for Winchester Town Centre from Winchester Business Improvement District. Observations on pedestrian flow was provided for other centres.

Barriers to New/Existing Businesses

16. To inform the health check especially of the higher order centres a broad review of potential barriers to new and existing businesses has been undertaken looking at factors such as availability of units to allow businesses to physically expand and availability of grants to support business growth and investment.

Extent of the Evening Economy

17. A centre's evening economy is increasingly becoming an important element for evaluation of town centres. The evening economy acts as a footfall draw to town centres and the analysis provides an indication of provision and type of provision and linkages with other cultural and leisure amenities.

3. Population and Expenditure

Lambert Smith Hampton

TABLE 1a: BASE YEAR POPULATION & PROJECTIONS (2019 - 2036)

		2019	2024	2029	2034	2036	Growth: 2019 to 2029 %	Growth: 2019 to 2029 Persons	Growth: 2019 to 2036 %	Growth: 2019 to 2036 Persons
Zone 1	Central Winchester	42,290	46,372	49,450	50,240	50,245	16.9%	7,160	15.8%	7,956
Zone 2	North Winchester	12,960	14,211	15,154	15,396	15,398	16.9%	2,194	15.8%	2,438
Zone 3	City South	13,465	14,765	15,745	15,996	15,998	16.9%	2,280	15.8%	2,533
Zone 4	Eastleigh	64,794	67,915	70,706	73,090	73,944	9.1%	5,912	12.5%	9,150
Zone 5	New Alresford	8,537	9,361	9,983	10,142	10,143	16.9%	1,446	15.8%	1,606
Zone 6	Upper Meon Valley	14,537	14,354	14,142	13,925	13,837	-2.7%	-395	-5.0%	-699
Zone 7	Bishop's Waltham	24,523	26,891	28,676	29,133	29,137	16.9%	4,152	15.8%	4,614
Zone 8	Whiteley & Fareham	40,096	42,174	43,934	44,931	45,228	9.6%	3,838	11.4%	5,131
Study Area		221,201	236,043	247,789	252,853	253,930	12.0%	26,587	12.9%	32,729
Winchester City District		127,932	138,697	146,738	148,638	148,566	14.7%	18,805	13.9%	20,634

Source: Experian Business Strategies - MMG3 Geographic Information Systmes (GIS) '*Retail Area Planner Population & Expenditure Datasets*'

Notes: Population projections (2019 to 2036) for Zones 1 to 3, 5 to 7, and Winchester electoral wards in Zone 8 are linked to housing supply identified from the Council's 'Future Local Housing Need Assessment and Strategic Housing and Market Area Assessment (SHMAA).

Population projections for Zone 4 (Eastleight Borough) and Eastleight Borough and Fareham Borough electoral wards situated in Zone 8 are derived from Experian, which are based on ONS 2014-based Sub-National Population Projections (released in May 2016).

TABLE 1b: EXPERIAN / ONS BASE YEAR POPULATION & PROJECTIONS (2019 - 2036)

		2019	2024	2029	2034	2036	Growth: 2019 to 2029 %	Growth: 2019 to 2029 Persons	Growth: 2019 to 2036 %	Growth: 2019 to 2036 Persons
Zone 1	Central Winchester	46,138	47,515	48,884	49,880	50,231	6.0%	2,746	8.2%	4,093
Zone 2	North Winchester	14,139	14,677	15,204	15,607	15,754	7.5%	1,065	10.3%	1,615
Zone 3	City South	14,690	15,292	15,873	16,286	16,454	8.1%	1,183	10.8%	1,764
Zone 4	Eastleigh	64,794	67,915	70,706	73,090	73,944	9.1%	5,912	12.5%	9,150
Zone 5	New Alresford	9,314	9,620	9,970	10,246	10,322	7.0%	656	9.8%	1,008
Zone 6	Upper Meon Valley	5,618	5,834	6,045	6,249	6,321	7.6%	427	11.2%	703
Zone 7	Bishop's Waltham	26,755	27,687	28,712	29,605	29,881	7.3%	1,957	10.6%	3,126
Zone 8	Whiteley & Fareham	41,154	42,608	43,951	45,099	45,542	6.8%	2,797	9.7%	4,388
Study Area		222,602	231,148	239,345	246,062	248,449	7.5%	16,743	10.5%	25,847
Winchester City District		129,333	133,802	138,294	141,847	143,085	6.9%	8,961	9.7%	13,752

Source: Experian Business Strategies - MMG3 Geographic Information Systmes (GIS) '*Retail Area Planner Population & Expenditure Datasets*'

Notes: Population projections for all zones (1-8) are derived from Experian, which are based on Office of National Statistics (ONS) 2014-based Sub-National Population Projections (released in May 2016).

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

		2019 INCLUDING SFT	2019	2024	2029	2034	2036
			EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN-BASED SFT MARKET SHARES (%):		14.0%	4.2%	5.5%	6.3%	6.7%	6.7%
SURVEY-BASED SFT MARKET SHARES (%):		7.5%	2.3%	3.0%	3.4%	3.5%	3.6%
Zone 1	Central Winchester	£2,266	£2,215	£2,217	£2,218	£2,225	£2,229
Zone 2	North Winchester	£2,494	£2,437	£2,439	£2,441	£2,449	£2,452
Zone 3	City South	£2,466	£2,410	£2,412	£2,413	£2,421	£2,425
Zone 4	Eastleigh	£2,460	£2,405	£2,407	£2,408	£2,416	£2,420
Zone 5	New Alresford	£2,606	£2,548	£2,550	£2,551	£2,560	£2,563
Zone 6	Upper Meon Valley	£2,869	£2,804	£2,807	£2,808	£2,817	£2,821
Zone 7	Bishop's Waltham	£2,528	£2,471	£2,473	£2,474	£2,483	£2,486
Zone 8	Whiteley & Fareham	£2,403	£2,348	£2,350	£2,352	£2,359	£2,363
Study Area Average		£2,511	£2,455	£2,457	£2,458	£2,466	£2,470

Source: Average spend per capita estimates (2017 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 17 published by Experian Business Strategies (February 2020).

Notes: At the Base Year (2019) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) drawing on the results of the household survey-derived market shares for SFT.

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 17 (February 2020).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million)

		2019 INCLUDING SFT	2019	2024	2029	2034	2036	Growth: 2019-2029 %	Growth: 2019-2029 £m	Growth: 2019-2036 %	Growth: 2019-2036 £m
			EXCLUDING SPECIAL FORMS OF TRADING								
Zone 1	Central Winchester	£95.8	£93.7	£102.8	£109.7	£111.8	£112.0	17.1%	£16.0	19.5%	£18.3
Zone 2	North Winchester	£32.3	£31.6	£34.7	£37.0	£37.7	£37.8	17.1%	£5.4	19.5%	£6.2
Zone 3	City South	£33.2	£32.4	£35.6	£38.0	£38.7	£38.8	17.1%	£5.5	19.5%	£6.3
Zone 4	Eastleigh	£159.4	£155.8	£163.5	£170.3	£176.6	£178.9	9.3%	£14.5	14.8%	£23.1
Zone 5	New Alresford	£22.3	£21.7	£23.9	£25.5	£26.0	£26.0	17.1%	£3.7	19.5%	£4.3
Zone 6	Upper Meon Valley	£41.7	£40.8	£40.3	£39.7	£39.2	£39.0	-2.6%	-£1.1	-4.2%	-£1.7
Zone 7	Bishop's Waltham	£62.0	£60.6	£66.5	£71.0	£72.3	£72.4	17.1%	£10.4	19.5%	£11.8
Zone 8	Whiteley & Fareham	£96.3	£94.2	£99.1	£103.3	£106.0	£106.9	9.7%	£9.2	13.5%	£12.7
Study Area		£543.1	£530.8	£566.3	£594.4	£608.4	£611.8	12.0%	£63.6	15.3%	£81.0

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding Special Forms of Trading)

		2019 INCLUDING SFT	2019	2024	2029	2034	2036
			EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN-BASED SFT MARKET SHARES (%):		23.4%	17.6%	21.3%	23.9%	25.2%	25.5%
SURVEY-BASED SFT MARKET SHARES (%):		26.3%	19.7%	23.8%	26.7%	28.2%	28.5%
Zone 1	Central Winchester	£4,280	£3,437	£3,809	£4,263	£4,844	£5,115
Zone 2	North Winchester	£5,279	£4,240	£4,698	£5,259	£5,975	£6,310
Zone 3	City South	£5,151	£4,137	£4,584	£5,131	£5,831	£6,157
Zone 4	Eastleigh	£4,908	£3,942	£4,368	£4,889	£5,556	£5,866
Zone 5	New Alresford	£5,371	£4,313	£4,779	£5,350	£6,079	£6,419
Zone 6	Upper Meon Valley	£5,902	£4,740	£5,253	£5,879	£6,681	£7,054
Zone 7	Bishop's Waltham	£5,295	£4,252	£4,712	£5,274	£5,993	£6,328
Zone 8	Whiteley & Fareham	£4,794	£3,850	£4,266	£4,775	£5,426	£5,729
Study Area Average		£5,149	£4,135	£4,582	£5,129	£5,828	£6,154

Source: Average spend per capita estimates (2017 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 17 published by Experian Business Strategies (February 2020).

Notes: At the Base Year (2019) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) drawing on the results of the household survey-derived market shares for SFT.

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 17 (February 2020).

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million)

		2019 INCLUDING SFT	2019	2024	2029	2034	2036	Growth: 2019-2029 %	Growth: 2019-2029 £m	Growth: 2019-2036 %	Growth: 2019-2036 £m
			EXCLUDING SPECIAL FORMS OF TRADING								
Zone 1	Central Winchester	£181.0	£145.4	£176.6	£210.8	£243.4	£257.0	45.0%	£65.5	76.8%	£111.7
Zone 2	North Winchester	£68.4	£54.9	£66.8	£79.7	£92.0	£97.2	45.0%	£24.7	76.8%	£42.2
Zone 3	City South	£69.4	£55.7	£67.7	£80.8	£93.3	£98.5	45.0%	£25.1	76.8%	£42.8
Zone 4	Eastleigh	£318.0	£255.4	£296.7	£345.7	£406.1	£433.8	35.4%	£90.3	69.8%	£178.4
Zone 5	New Alresford	£45.8	£36.8	£44.7	£53.4	£61.6	£65.1	45.0%	£16.6	76.8%	£28.3
Zone 6	Upper Meon Valley	£85.8	£68.9	£75.4	£83.1	£93.0	£97.6	20.7%	£14.2	41.7%	£28.7
Zone 7	Bishop's Waltham	£129.9	£104.3	£126.7	£151.2	£174.6	£184.4	45.0%	£47.0	76.8%	£80.1
Zone 8	Whiteley & Fareham	£192.2	£154.4	£179.9	£209.8	£243.8	£259.1	35.9%	£55.4	67.9%	£104.8
Study Area		£1,090.5	£875.8	£1,034.5	£1,214.6	£1,407.8	£1,492.7	38.7%	£338.8	70.4%	£616.9

4. Convenience Goods Market Share Analysis (including SFT)

Lambert Smith Hampton

TABLE 1: ALL CONVENIENCE GOODS - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zones:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Study Area excl Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	0.9%	0.0%	0.0%	0.1%	0.0%	0.5%	0.0%	0.0%	0.2%	0.3%
Iceland, Middle Brook Street, Winchester	3.7%	0.5%	0.0%	0.0%	0.1%	1.0%	0.0%	0.0%	0.8%	1.1%
Marks & Spencer Foodhall, High Street, Winchester	4.2%	0.4%	2.1%	0.4%	1.4%	0.0%	0.2%	0.1%	1.1%	1.4%
M&S Simply Food, Winchester Rail Station, Winchester	0.3%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.1%	0.2%
Sainsbury's Superstore, Middlebrook Street, Winchester	11.1%	3.0%	0.6%	0.0%	0.0%	3.2%	0.0%	0.0%	2.4%	3.4%
Tesco Express, High Street, Winchester	3.0%	0.3%	0.2%	0.0%	0.0%	1.6%	0.0%	0.0%	0.7%	1.0%
Other	1.3%	0.6%	0.5%	0.0%	0.5%	0.2%	0.0%	0.0%	0.3%	0.5%
Sub-Total	24.5%	4.9%	3.4%	0.5%	2.0%	7.2%	0.2%	0.1%	5.6%	7.8%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.6%	0.1%	0.2%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	1.8%	2.6%	0.9%	0.9%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%	7.0%	1.3%	1.9%
Sub-Total	0.0%	0.0%	0.0%	0.8%	0.0%	0.3%	2.4%	10.2%	2.4%	3.0%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	0.3%	0.5%	0.0%	0.2%	0.0%	2.1%	9.4%	0.6%	1.5%	2.0%
Co-op, High Street, Bishop's Waltham	0.0%	0.1%	0.0%	0.0%	0.0%	1.2%	11.5%	0.4%	1.5%	2.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	3.1%	0.0%	0.4%	0.5%
Sub-Total	0.3%	0.6%	0.0%	0.2%	0.0%	3.7%	24.1%	1.1%	3.4%	4.7%
New Alresford District Centre										
Co-op, West Street, Alresford	0.2%	0.0%	0.0%	0.0%	16.5%	3.3%	0.0%	0.0%	1.0%	1.4%
Tesco Express, Broad Street, Alresford	0.2%	0.0%	0.0%	0.0%	14.7%	3.4%	0.0%	0.0%	0.9%	1.3%
Other	0.0%	0.0%	0.0%	0.0%	3.5%	0.3%	0.0%	0.0%	0.2%	0.2%
Sub-Total	0.4%	0.0%	0.0%	0.0%	34.8%	7.0%	0.0%	0.0%	2.0%	2.9%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.4%	4.0%	0.9%	1.2%
Other	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.3%	1.1%	0.3%	0.3%
Sub-Total	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%	1.6%	5.0%	1.1%	1.6%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	14.2%	20.9%	2.2%	0.0%	3.2%	3.5%	0.1%	0.0%	4.3%	6.1%
Waitrose, Stockbridge Road, Winchester	11.6%	13.7%	3.8%	0.0%	1.2%	0.0%	1.2%	0.0%	3.3%	4.7%
Other	0.8%	1.6%	0.0%	0.1%	0.3%	0.0%	0.5%	0.0%	0.3%	0.4%
Sub-Total	26.6%	36.1%	6.0%	0.1%	4.7%	3.5%	1.9%	0.0%	7.9%	11.2%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.4%	0.6%
Kings Worthy Local Centre	0.1%	9.9%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.6%	0.9%
Stockbridge Road/Andover Road Local Centre	2.1%	0.3%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.6%
Village centres/ neighbourhood stores	3.0%	3.7%	12.8%	0.3%	0.2%	6.5%	2.6%	0.7%	2.5%	3.5%
Sub-Total	5.2%	13.8%	13.6%	0.3%	0.5%	6.5%	6.0%	0.7%	4.0%	5.5%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	14.3%	5.8%	38.8%	3.8%	7.8%	6.5%	1.0%	0.0%	7.3%	8.7%
Tesco Extra, Easton Lane, Winchester	14.5%	25.0%	3.6%	2.1%	28.6%	20.6%	1.7%	0.1%	7.8%	10.2%
Other	0.1%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
Sub-Total	28.9%	31.3%	42.3%	5.9%	36.3%	27.2%	2.7%	0.1%	15.2%	19.0%
WINCHESTER DISTRICT	85.9%	86.8%	65.3%	8.0%	78.4%	55.8%	38.9%	17.2%	41.6%	55.6%
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	1.1%	0.0%	2.7%	6.5%	0.0%	0.4%	0.1%	0.0%	2.3%	0.6%
Asda, Bournemouth Road, Chandler's Ford	2.0%	1.5%	4.4%	13.5%	0.4%	1.2%	0.7%	0.9%	5.0%	1.5%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	0.5%	0.0%	7.6%	7.9%	1.4%	1.3%	0.1%	0.6%	3.1%	1.2%
Other	0.8%	0.0%	0.5%	4.8%	0.0%	0.0%	0.0%	0.4%	1.6%	0.3%
Sub-Total	4.3%	1.5%	15.2%	32.8%	1.8%	2.8%	0.9%	1.9%	12.1%	3.6%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	0.3%	2.1%	5.0%	0.2%	1.6%	1.0%	0.0%	1.9%	0.5%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastleigh	0.0%	0.0%	0.7%	1.1%	0.0%	0.0%	0.2%	0.0%	0.4%	0.1%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	1.1%	5.9%	0.0%	0.3%	0.4%	0.0%	1.9%	0.2%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	2.3%	6.7%	0.0%	0.4%	0.0%	0.0%	2.1%	0.2%
Other Eastleigh Town Centre	0.0%	0.0%	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Sub-Total	0.0%	0.3%	6.4%	19.5%	0.2%	2.3%	1.6%	0.0%	6.5%	1.1%
Fareham Town Centre										
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	13.8%	2.7%	3.9%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	3.7%	0.8%	1.1%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%	0.2%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	5.5%	1.2%	1.7%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	1.1%	0.3%	0.4%
Sainsbury's Superstore, Wallington Way,Fareham	0.0%	0.0%	0.0%	0.7%	0.0%	0.9%	7.2%	27.0%	5.9%	8.0%
Sub-Total	0.0%	0.0%	0.0%	0.8%	0.0%	1.1%	13.3%	51.9%	11.0%	15.3%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.2%	0.1%	2.3%	9.0%	0.0%	3.1%	12.3%	5.3%	5.4%	3.9%
Other Hedge End	0.1%	0.0%	0.7%	1.3%	0.0%	0.8%	1.3%	2.2%	1.0%	0.9%
Sub-Total	0.2%	0.1%	3.0%	10.2%	0.0%	3.9%	13.6%	7.4%	6.4%	4.8%
Alton	0.0%	0.0%	0.0%	0.0%	10.6%	1.9%	0.0%	0.0%	0.6%	0.8%
Andover	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Basingstoke	0.0%	0.8%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.2%	0.4%
Southampton	0.2%	0.0%	0.0%	3.2%	0.0%	2.2%	0.2%	1.1%	1.4%	0.6%
Portsmouth	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	2.3%	0.6%	0.6%	0.5%
Romsey	0.1%	0.0%	0.5%	0.4%	0.0%	1.2%	0.0%	0.0%	0.3%	0.2%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	16.9%	2.1%	2.3%	3.3%
Other	0.1%	1.3%	2.0%	16.3%	2.3%	17.5%	4.3%	12.8%	9.2%	6.2%
OUTSIDE OF WINCHESTER DISTRICT	**4.9%**	**7.4%**	**27.1%**	**83.9%**	**14.9%**	**35.9%**	**53.0%**	**77.9%**	**50.8%**	**37.1%**
SFT/ONLINE	**9.2%**	**5.7%**	**7.6%**	**8.2%**	**6.7%**	**8.3%**	**8.1%**	**4.9%**	**7.5%**	**7.3%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 2: MAIN FOOD PURCHASES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Study Area excl Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Middle Brook Street, Winchester	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%
Marks & Spencer Foodhall, High Street, Winchester	1.4%	0.6%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.4%	0.5%
M&S Simply Food, Winchester Rail Station, Winchester	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.1%
Sainsbury's Superstore, Middlebrook Street, Winchester	5.5%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.6%
Tesco Express, High Street, Winchester	0.5%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Other	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Sub-Total	11.6%	3.4%	0.0%	0.0%	2.4%	1.3%	0.0%	0.0%	2.6%	3.5%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	2.3%	2.6%	1.1%	1.0%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.2%	1.6%	2.0%
Sub-Total	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	2.3%	10.7%	2.7%	3.1%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	0.0%	0.9%	0.0%	0.0%	0.0%	0.5%	5.1%	0.4%	0.8%	1.0%
Co-op, High Street, Bishop's Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.6%	0.8%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.2%	0.3%
Sub-Total	0.0%	0.9%	0.0%	0.0%	0.0%	0.5%	11.7%	0.4%	1.6%	2.1%
New Alresford District Centre										
Co-op, West Street, Alresford	0.3%	0.0%	0.0%	0.0%	6.2%	2.1%	0.0%	0.0%	0.4%	0.7%
Tesco Express, Broad Street, Alresford	0.3%	0.0%	0.0%	0.0%	7.0%	1.3%	0.0%	0.0%	0.4%	0.6%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.6%	0.0%	0.0%	0.0%	13.2%	3.4%	0.0%	0.0%	0.8%	1.3%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.3%	0.4%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.1%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.4%	0.5%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	17.2%	25.0%	1.8%	0.0%	5.2%	4.0%	0.0%	0.0%	17.2%	7.3%
Waitrose, Stockbridge Road, Winchester	9.9%	14.0%	3.9%	0.0%	0.6%	0.0%	1.9%	0.0%	9.9%	4.3%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	27.1%	39.0%	5.7%	0.0%	5.8%	4.0%	1.9%	0.0%	27.1%	11.6%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%	0.1%
Kings Worthy Local Centre	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Stockbridge Road/Andover Road Local Centre	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Village centres/ neighbourhood stores	2.3%	0.0%	1.2%	0.5%	0.0%	0.0%	0.7%	0.0%	0.7%	0.8%
Sub-Total	3.4%	0.0%	1.2%	0.5%	0.6%	0.0%	1.1%	0.0%	1.1%	1.2%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	18.4%	6.8%	52.2%	5.1%	9.6%	9.6%	1.2%	0.0%	9.7%	11.5%
Tesco Extra, Easton Lane, Winchester	20.8%	32.3%	3.9%	2.3%	38.8%	32.6%	2.7%	0.0%	9.9%	14.5%
Sub-Total	39.2%	39.1%	56.1%	7.4%	48.4%	42.2%	3.8%	0.0%	19.6%	26.0%
WINCHESTER DISTRICT	82.0%	82.4%	62.9%	9.0%	70.5%	51.4%	20.8%	12.9%	37.5%	49.1%
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	1.1%	0.0%	2.7%	8.9%	0.0%	0.0%	0.0%	0.0%	3.0%	0.5%
Asda, Bournemouth Road, Chandler's Ford	2.3%	2.2%	4.7%	17.4%	0.0%	2.0%	1.1%	1.6%	6.4%	2.0%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	0.3%	0.0%	5.5%	6.8%	2.4%	1.6%	0.0%	0.0%	2.5%	0.9%
Other	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.6%	0.2%	0.2%
Sub-Total	3.7%	2.2%	13.5%	33.1%	2.4%	3.5%	1.1%	2.2%	12.1%	3.5%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	0.0%	2.1%	7.0%	0.0%	2.6%	1.6%	0.0%	2.4%	0.7%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastleigh	0.0%	0.0%	0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	1.2%	6.7%	0.0%	0.5%	0.7%	0.0%	2.1%	0.3%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	3.4%	7.3%	0.0%	0.5%	0.0%	0.0%	2.4%	0.4%
Other Eastleigh Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	7.3%	21.4%	0.0%	3.7%	2.3%	0.0%	7.1%	1.4%
Fareham Town Centre										0.0%
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	16.3%	3.6%	4.6%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	5.0%	1.2%	1.5%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.3%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	2.8%	0.9%	1.1%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%	0.1%
Sainsbury's Superstore, Wallington Way,Fareham	0.0%	0.0%	0.0%	1.2%	0.0%	1.0%	9.8%	37.4%	8.9%	11.1%
Sub-Total	0.0%	0.0%	0.0%	1.2%	0.0%	1.0%	18.1%	62.5%	14.8%	18.7%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.3%	0.0%	2.9%	11.5%	0.0%	4.5%	18.1%	6.8%	7.2%	5.4%
Other Hedge End	0.0%	0.0%	0.6%	1.4%	0.0%	1.0%	1.1%	2.1%	1.0%	0.9%
Sub-Total	0.3%	0.0%	3.5%	12.9%	0.0%	5.5%	19.2%	8.9%	8.2%	6.3%
Alton	0.0%	0.0%	0.0%	0.0%	14.2%	2.6%	0.0%	0.0%	0.7%	1.1%
Andover	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Basingstoke	0.0%	0.6%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.1%	0.3%
Southampton	0.0%	0.0%	0.0%	3.8%	0.0%	2.0%	0.0%	1.2%	1.4%	0.5%
Portsmouth	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	3.6%	0.4%	0.8%	0.7%
Romsey	0.0%	0.0%	0.6%	0.5%	0.0%	2.0%	0.0%	0.0%	0.2%	0.3%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	21.4%	3.3%	3.2%	4.3%
Other	0.0%	0.6%	0.0%	4.4%	2.5%	13.3%	3.2%	2.0%	2.5%	2.7%
OUTSIDE OF WINCHESTER DISTRICT	**4.0%**	**8.2%**	**24.8%**	**78.3%**	**19.0%**	**36.2%**	**68.9%**	**80.5%**	**51.4%**	**40.2%**
SFT/ONLINE	**14.0%**	**9.4%**	**12.2%**	**12.6%**	**10.5%**	**12.4%**	**10.2%**	**6.6%**	**11.1%**	**10.6%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 3: OTHER ('SECONDARY') MAIN FOOD PURCHASES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Study Area excl Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Iceland, Middle Brook Street, Winchester	5.8%	3.4%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	1.6%	1.8%
Marks & Spencer Foodhall, High Street, Winchester	4.0%	0.9%	1.8%	0.5%	0.0%	0.0%	0.0%	1.2%	1.4%	1.5%
M&S Simply Food, Winchester Rail Station, Winchester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Middlebrook Street, Winchester	9.5%	0.0%	2.3%	0.0%	0.0%	4.1%	0.0%	0.0%	2.4%	3.0%
Tesco Express, High Street, Winchester	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%
Other	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	21.6%	5.1%	4.1%	0.5%	1.1%	4.1%	0.0%	1.2%	6.0%	7.0%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.2%	0.3%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	1.5%	0.7%	1.0%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	3.9%	0.7%	1.3%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	6.0%	5.4%	1.6%	2.6%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	10.3%	0.0%	1.2%	2.0%
Co-op, High Street, Bishop's Waltham	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.7%	1.0%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	1.3%	0.0%	0.0%	0.0%	2.7%	15.9%	0.0%	1.9%	3.0%
New Alresford District Centre										
Co-op, West Street, Alresford	0.0%	0.0%	0.0%	0.0%	2.1%	1.1%	0.0%	0.0%	0.1%	0.2%
Tesco Express, Broad Street, Alresford	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.2%	0.2%
Other	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	0.0%	0.0%	0.0%	0.0%	8.0%	1.1%	0.0%	0.0%	0.4%	0.6%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.7%	1.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.1%	0.1%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	4.2%	0.8%	1.2%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	20.3%	16.8%	7.7%	0.0%	1.1%	8.4%	1.3%	0.0%	6.7%	8.3%
Waitrose, Stockbridge Road, Winchester	14.1%	18.3%	0.0%	0.0%	8.4%	0.0%	1.3%	0.0%	5.0%	5.8%
Other	0.4%	1.3%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.3%	0.4%
Sub-Total	34.8%	36.4%	7.7%	0.0%	12.2%	8.4%	2.6%	0.0%	12.0%	14.5%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kings Worthy Local Centre	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Stockbridge Road/Andover Road Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Village centres/ neighbourhood stores	0.0%	0.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	0.0%	3.1%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	19.2%	9.0%	22.8%	7.2%	20.2%	8.1%	1.3%	0.0%	9.9%	9.8%
Tesco Extra, Easton Lane, Winchester	8.6%	28.1%	12.6%	5.0%	28.1%	8.5%	0.8%	0.8%	7.8%	8.5%
Sub-Total	27.7%	37.2%	35.3%	12.2%	48.2%	16.6%	2.1%	0.8%	17.7%	18.3%
WINCHESTER DISTRICT	**84.2%**	**83.0%**	**48.0%**	**12.7%**	**69.5%**	**35.6%**	**27.4%**	**11.6%**	**40.6%**	**47.4%**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford, Eastleigh	3.3%	0.0%	7.8%	5.8%	0.0%	4.1%	1.3%	0.0%	3.2%	2.2%
Asda, Bournemouth Road, Chandler's Ford, Eastleigh	6.0%	1.3%	7.2%	19.3%	4.2%	0.0%	0.0%	0.0%	7.8%	2.5%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	0.0%	0.0%	22.6%	15.6%	0.0%	3.2%	0.0%	0.8%	6.4%	2.5%
Other	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Sub-Total	9.3%	1.3%	37.6%	42.4%	4.2%	7.3%	1.3%	0.8%	18.0%	7.1%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	3.4%	3.1%	5.6%	0.0%	0.0%	0.0%	0.0%	2.1%	0.6%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastleigh	0.0%	0.0%	0.9%	1.3%	0.0%	0.0%	2.1%	0.0%	0.7%	0.4%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	2.2%	6.4%	0.0%	0.0%	0.0%	0.0%	2.0%	0.2%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	0.9%	7.7%	0.0%	1.1%	0.0%	0.0%	2.4%	0.2%
Other Eastleigh Town Centre	0.0%	0.0%	0.9%	0.5%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Sub-Total	0.0%	3.4%	8.1%	21.5%	0.0%	1.1%	2.1%	0.0%	7.4%	1.4%
Fareham Town Centre										
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	20.8%	3.9%	5.8%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	1.2%	1.9%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.3%	0.5%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	11.9%	2.1%	3.0%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.8%	0.2%	0.3%
Sainsbury's Superstore, Wallington Way, Broadcut, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	10.2%	12.9%	3.3%	5.2%
Sub-Total	0.0%	0.0%	0.0%	0.5%	0.0%	3.2%	14.4%	55.7%	11.1%	16.7%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.0%	0.9%	4.1%	11.0%	0.0%	3.8%	8.1%	3.5%	5.1%	3.0%
Other Hedge End	0.0%	0.0%	0.0%	2.5%	0.0%	2.1%	1.7%	3.1%	1.5%	1.3%
Sub-Total	0.0%	0.9%	4.1%	13.5%	0.0%	5.9%	9.8%	6.6%	6.6%	4.3%
Alton	0.0%	0.0%	0.0%	0.0%	17.4%	3.7%	0.0%	0.0%	0.8%	1.4%
Andover	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Basingstoke	0.0%	4.1%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.4%	0.8%
Southampton	1.7%	0.0%	0.0%	3.2%	0.0%	6.8%	0.0%	0.8%	1.6%	1.3%
Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	3.9%	0.8%	1.2%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	1.2%	2.9%	4.3%
Other	0.0%	3.0%	0.0%	2.2%	5.1%	28.5%	8.1%	15.0%	5.0%	8.7%
OUTSIDE OF WINCHESTER DISTRICT	**11.0%**	**16.1%**	**49.7%**	**83.3%**	**26.7%**	**60.7%**	**62.0%**	**83.8%**	**54.8%**	**47.6%**
SFT/ONLINE	**4.8%**	**0.9%**	**2.3%**	**3.9%**	**3.8%**	**3.8%**	**10.5%**	**4.6%**	**4.6%**	**5.0%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 4:TOP UP FOOD PURCHASES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading *0*

	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Study Area excl Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Iceland, Middle Brook Street, Winchester	1.7%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.5%	0.9%
Marks & Spencer Foodhall, High Street, Winchester	7.4%	0.0%	3.1%	1.3%	0.0%	0.0%	0.9%	0.0%	2.4%	2.3%
M&S Simply Food, Winchester Rail Station, Winchester	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%
Sainsbury's Superstore, Middlebrook Street, Winchester	25.8%	6.2%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	6.4%	8.2%
Tesco Express, High Street, Winchester	10.9%	0.0%	1.0%	0.0%	0.0%	4.9%	0.0%	0.0%	2.6%	3.3%
Other	4.2%	2.8%	0.0%	0.0%	2.3%	1.0%	0.0%	0.0%	1.2%	1.5%
Sub-Total	53.1%	9.0%	4.1%	1.3%	2.3%	22.0%	0.9%	0.0%	13.8%	17.0%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.3%	0.5%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.7%	1.2%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	1.0%	1.6%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	2.0%	3.3%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	16.1%	0.0%	2.0%	3.5%
Co-op, High Street, Bishop's Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	27.2%	1.0%	3.4%	5.0%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	9.2%	0.0%	1.1%	1.5%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	12.3%	52.5%	1.0%	6.5%	10.1%
New Alresford District Centre										
Co-op, West Street, Alresford	0.3%	0.0%	0.0%	0.0%	37.5%	6.7%	0.0%	0.0%	1.7%	3.0%
Tesco Express, Broad Street, Alresford	0.0%	0.0%	0.0%	0.0%	35.5%	3.9%	0.0%	0.0%	1.5%	2.5%
Other	0.0%	0.0%	0.0%	0.0%	11.0%	1.6%	0.0%	0.0%	0.5%	0.8%
Sub-Total	0.3%	0.0%	0.0%	0.0%	84.0%	12.1%	0.0%	0.0%	3.6%	6.3%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	11.9%	2.6%	4.0%
Other	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	2.5%	0.6%	0.6%
Sub-Total	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	6.2%	14.5%	3.2%	4.6%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	5.2%	12.2%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.9%	2.5%
Waitrose, Stockbridge Road, Winchester	15.2%	16.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	5.3%
Other	2.5%	5.5%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	1.2%	1.5%
Sub-Total	22.9%	34.3%	0.7%	0.0%	0.0%	1.6%	2.5%	0.0%	7.5%	9.2%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.2%	0.0%	1.2%	1.7%
Kings Worthy Local Centre	0.0%	30.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	2.6%
Stockbridge Road/Andover Road Local Centre	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.6%
Village centres/ neighbourhood stores	6.4%	12.3%	55.1%	0.0%	0.9%	23.8%	7.5%	0.6%	7.8%	11.4%
Sub-Total	8.8%	42.8%	56.5%	0.0%	0.9%	23.8%	17.7%	0.6%	11.3%	16.4%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	3.3%	2.0%	24.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	3.1%
Tesco Extra, Easton Lane, Winchester	4.5%	7.1%	0.0%	0.5%	10.2%	0.0%	0.0%	0.0%	2.0%	2.3%
Other	0.5%	1.6%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%	0.3%
Sub-Total	8.3%	10.7%	24.7%	0.5%	10.2%	0.6%	0.0%	0.0%	4.8%	5.8%
WINCHESTER DISTRICT	**93.5%**	**96.8%**	**86.0%**	**2.4%**	**97.3%**	**72.5%**	**79.8%**	**29.1%**	**52.7%**	**72.7%**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford, Eastleigh	0.3%	0.0%	1.7%	2.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%
Asda, Bournemouth Road, Chandler's Ford, Eastleigh	0.0%	0.0%	2.6%	3.5%	0.0%	0.0%	0.0%	0.0%	1.3%	0.2%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	1.4%	0.0%	2.4%	10.1%	0.0%	0.0%	0.0%	2.5%	4.0%	1.2%
Other	4.0%	0.0%	0.7%	15.2%	0.0%	0.0%	0.0%	0.0%	5.6%	1.0%
Sub-Total	5.7%	0.0%	7.4%	30.8%	0.0%	0.0%	0.0%	2.5%	11.7%	2.7%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	0.0%	2.6%	0.0%	0.9%	0.0%	0.0%	0.0%	0.2%	0.3%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastleigh	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	0.7%	4.4%	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%
Other Eastleigh Town Centre	0.0%	0.0%	0.7%	2.3%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%
Sub-Total	0.0%	0.0%	3.9%	13.2%	0.9%	0.0%	0.0%	0.0%	4.4%	0.4%
Fareham Town Centre										
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	1.4%	2.2%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.1%	0.1%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	9.5%	1.7%	2.7%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	2.9%	0.5%	0.8%
Sainsbury's Superstore, Wallington Way, Broadcut, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	11.2%	1.8%	2.9%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	3.1%	32.5%	5.5%	8.7%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.0%	0.0%	0.7%	2.0%	0.0%	0.0%	2.5%	3.4%	1.5%	1.3%
Other Hedge End	0.3%	0.0%	0.7%	0.9%	0.0%	0.0%	1.6%	1.0%	0.7%	0.6%
Sub-Total	0.3%	0.0%	1.4%	2.9%	0.0%	0.0%	4.1%	4.3%	2.2%	2.0%
Alton	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.1%
Andover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.1%	0.3%
Southampton	0.0%	0.0%	0.0%	1.3%	0.0%	1.6%	0.0%	1.6%	0.7%	0.6%
Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Romsey	0.5%	0.0%	0.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.6%	0.9%
Other	0.0%	3.2%	0.7%	48.0%	0.9%	20.3%	5.0%	29.0%	20.9%	10.7%
OUTSIDE OF WINCHESTER DISTRICT	**6.5%**	**3.2%**	**14.0%**	**96.7%**	**2.7%**	**25.0%**	**17.8%**	**70.0%**	**46.5%**	**26.4%**
SFT/ONLINE	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**0.0%**	**2.5%**	**2.5%**	**1.0%**	**0.8%**	**0.9%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 5: OTHER TOP UP FOOD PURCHASES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Study Area excl Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	5.9%	0.0%	0.0%	1.1%	0.0%	4.9%	0.0%	0.0%	1.8%	2.0%
Iceland, Middle Brook Street, Winchester	6.6%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.8%
Marks & Spencer Foodhall, High Street, Winchester	14.1%	0.0%	12.7%	0.7%	0.0%	0.0%	0.0%	0.0%	4.0%	4.6%
M&S Simply Food, Winchester Rail Station, Winchester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Middlebrook Street, Winchester	17.1%	4.3%	3.2%	0.0%	0.0%	4.9%	0.0%	0.0%	4.3%	5.5%
Tesco Express, High Street, Winchester	4.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	1.1%	1.7%
Other	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%
Sub-Total	47.7%	6.1%	21.3%	1.9%	0.0%	15.8%	0.0%	0.0%	13.0%	16.0%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.3%	0.6%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	4.0%	1.2%	1.8%
Sub-Total	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	4.6%	6.4%	1.9%	2.4%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	3.0%	0.0%	0.0%	1.9%	0.0%	0.0%	21.0%	4.0%	4.6%	5.1%
Co-op, High Street, Bishop's Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	26.4%	2.4%	3.9%	5.4%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	2.3%	0.0%	0.4%	0.7%
Sub-Total	3.0%	0.0%	0.0%	1.9%	0.0%	7.0%	49.8%	6.4%	8.9%	11.1%
New Alresford District Centre										
Co-op, West Street, Alresford	0.0%	0.0%	0.0%	0.0%	50.7%	5.8%	0.0%	0.0%	2.5%	3.6%
Tesco Express, Broad Street, Alresford	0.0%	0.0%	0.0%	0.0%	30.7%	18.4%	0.0%	0.0%	1.9%	3.8%
Other	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.5%	0.7%
Sub-Total	0.0%	0.0%	0.0%	0.0%	92.7%	24.2%	0.0%	0.0%	4.9%	8.0%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	1.2%	3.2%	0.7%	1.3%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	3.2%	0.7%	1.1%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	2.9%	6.3%	1.3%	2.4%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	8.0%	17.1%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	3.7%
Waitrose, Stockbridge Road, Winchester	12.3%	1.7%	13.8%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	4.4%
Other	2.3%	3.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	1.1%	0.9%
Sub-Total	22.6%	22.3%	17.0%	1.1%	0.0%	0.0%	0.0%	0.0%	7.5%	9.0%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%	1.5%	1.8%
Kings Worthy Local Centre	0.8%	35.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	3.2%
Stockbridge Road/Andover Road Local Centre	9.1%	2.6%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	3.0%
Village centres/ neighbourhood stores	3.7%	11.2%	9.6%	0.0%	0.0%	17.7%	6.5%	5.6%	4.1%	7.1%
Sub-Total	13.6%	49.1%	15.1%	0.0%	0.0%	17.7%	17.6%	5.6%	10.2%	15.0%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	6.5%	4.3%	2.1%	0.7%	0.0%	0.0%	1.8%	0.0%	2.3%	2.5%
Tesco Extra, Easton Lane, Winchester	2.9%	13.8%	0.0%	1.1%	4.1%	1.3%	0.0%	0.0%	2.0%	2.3%
Other	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	9.4%	19.9%	2.1%	1.9%	4.1%	1.3%	1.8%	0.0%	4.4%	4.9%
WINCHESTER DISTRICT	**96.2%**	**97.4%**	**55.5%**	**7.9%**	**96.8%**	**69.2%**	**76.6%**	**24.8%**	**52.2%**	**68.8%**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford, Eastleigh	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Asda, Bournemouth Road, Chandler's Ford, Eastleigh	0.0%	0.0%	3.2%	4.9%	0.0%	0.0%	0.0%	0.0%	1.8%	0.3%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	0.0%	0.0%	15.9%	2.7%	0.0%	0.0%	1.2%	0.0%	1.8%	1.6%
Other	0.0%	0.0%	0.0%	16.1%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%
Sub-Total	0.0%	0.0%	19.1%	25.6%	0.0%	0.0%	1.2%	0.0%	9.5%	1.8%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastleigh	0.0%	0.0%	2.1%	4.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.2%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	2.1%	2.9%	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Other Eastleigh Town Centre	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Sub-Total	0.0%	0.0%	4.3%	18.5%	0.0%	0.0%	0.0%	0.0%	6.3%	0.4%
Fareham Town Centre										
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.6%	0.4%	0.6%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.2%	0.2%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	1.0%	1.8%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.7%	1.2%
Sainsbury's Superstore, Wallington Way, Broadcut, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	10.4%	1.6%	2.8%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	23.9%	3.7%	6.6%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	1.8%	1.6%	2.4%	0.7%
Other Hedge End	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	1.2%	4.0%	0.8%	1.4%
Sub-Total	0.0%	0.0%	2.1%	6.0%	0.0%	0.0%	2.9%	5.6%	3.2%	2.1%
Alton	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.1%	0.1%
Andover	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.1%	0.5%
Southampton	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	1.8%	0.0%	1.4%	0.3%
Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.5%	0.7%
Other	0.8%	0.0%	19.0%	38.3%	1.6%	25.8%	5.3%	43.4%	21.1%	16.5%
OUTSIDE OF WINCHESTER DISTRICT	**0.8%**	**2.6%**	**44.5%**	**92.1%**	**3.2%**	**30.8%**	**18.7%**	**72.9%**	**46.2%**	**29.1%**
SFT/ONLINE	**3.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.6%**	**2.4%**	**1.6%**	**2.1%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

5. Comparison Goods Market Share Analysis (including SFT)

TABLE 1: ALL COMPARISON GOODS - 2019 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	35.4%	25.7%	20.2%	5.3%	22.3%	11.6%	3.9%	0.4%	12.7%	15.8%
Whiteley Town Centre	0.4%	0.0%	0.0%	0.8%	0.3%	0.4%	3.0%	6.5%	1.8%	2.3%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.2%	0.0%	2.0%	8.6%	0.3%	1.3%	1.7%
New Alresford District Centre	0.3%	0.6%	0.0%	0.0%	11.8%	3.3%	0.1%	0.0%	0.9%	1.2%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	1.2%	0.3%	0.4%
Local Centres	0.0%	2.9%	0.6%	0.2%	0.2%	0.1%	1.2%	0.0%	0.4%	0.5%
Smaller centres	1.5%	2.7%	2.1%	0.3%	1.2%	2.3%	0.1%	0.1%	0.9%	1.1%
Sub-Total	37.6%	32.0%	22.9%	6.8%	35.9%	19.9%	17.3%	8.4%	18.3%	23.0%
Out of Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Andover Road Retail Park	0.6%	0.8%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.2%	0.2%
Easton Lane	5.7%	9.3%	2.8%	0.7%	12.0%	7.7%	0.1%	0.0%	3.0%	4.0%
Other	5.0%	4.4%	9.0%	0.6%	3.7%	2.5%	0.1%	0.0%	2.2%	2.9%
Sub-Total	11.3%	14.4%	11.7%	1.6%	15.9%	10.2%	0.2%	0.0%	5.5%	7.1%
WINCHESTER DISTRICT	**48.9%**	**46.4%**	**34.6%**	**8.4%**	**51.8%**	**30.1%**	**17.5%**	**8.4%**	**23.8%**	**30.1%**
Eastleigh Town Centre	1.1%	2.3%	6.5%	17.1%	0.5%	1.6%	0.8%	0.2%	6.0%	1.5%
Eastleigh Out of Centre	0.9%	0.6%	6.3%	5.9%	0.6%	1.0%	0.0%	0.1%	2.4%	1.0%
Sub-Total	2.1%	3.0%	12.8%	23.1%	1.1%	2.6%	0.8%	0.3%	8.5%	2.5%
Basingstoke Town Centre	0.8%	2.6%	0.0%	0.0%	3.0%	3.7%	0.1%	0.0%	0.7%	1.0%
Brighton Hill Retail Park	0.4%	1.8%	0.0%	0.0%	0.1%	0.7%	0.0%	0.0%	0.2%	0.3%
Other Basingtoke Out of Centre	0.1%	0.2%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.2%	0.1%
Sub-Total	1.3%	4.7%	0.0%	0.4%	3.5%	4.4%	0.1%	0.0%	1.1%	1.4%
Fareham Town Centre	0.0%	0.2%	0.3%	0.2%	0.0%	0.3%	7.2%	23.6%	5.1%	7.2%
Fareham Out of Centre	0.0%	0.0%	0.3%	0.1%	0.0%	0.1%	1.5%	8.0%	1.7%	2.3%
Sub-Total	0.0%	0.2%	0.6%	0.3%	0.0%	0.4%	8.7%	31.6%	6.8%	9.4%
Southampton City Centre	14.0%	10.2%	12.1%	9.9%	12.0%	10.7%	6.0%	8.0%	10.1%	10.2%
Hedge End Retail Park	2.8%	5.0%	9.3%	20.1%	2.8%	8.4%	16.2%	11.2%	11.9%	8.6%
Other Southampton Out of Centre	3.5%	0.7%	2.5%	1.6%	1.7%	2.4%	0.6%	1.8%	1.9%	2.0%
Sub-Total	20.3%	16.0%	24.0%	31.6%	16.5%	21.6%	22.8%	21.0%	23.9%	20.8%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.5%	0.0%	0.1%	2.4%	2.9%	1.0%	1.1%
Out of Centre Portsmouth	0.0%	0.5%	0.0%	0.2%	0.6%	0.4%	0.5%	0.9%	0.4%	0.4%
Sub-Total	0.0%	0.5%	0.0%	0.7%	0.6%	0.5%	2.9%	3.9%	1.3%	1.6%
Alton	0.0%	0.1%	0.0%	0.0%	1.5%	0.8%	0.0%	0.0%	0.1%	0.2%
Andover	0.2%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Chandlers Ford	0.3%	0.5%	2.3%	4.9%	1.1%	0.6%	0.1%	0.1%	1.8%	0.5%
Romsey	0.0%	0.0%	0.2%	0.1%	0.5%	0.1%	0.2%	0.0%	0.1%	0.1%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	10.0%	1.9%	1.6%	2.2%
All Other	1.5%	2.9%	2.0%	4.1%	1.6%	9.8%	6.2%	6.8%	4.5%	4.7%
OUTSIDE WINCHESTER DISTRICT	**25.8%**	**30.6%**	**41.8%**	**65.2%**	**26.4%**	**41.6%**	**51.8%**	**65.6%**	**50.0%**	**43.7%**
SFT/ ONLINE	**25.3%**	**23.0%**	**23.6%**	**26.5%**	**21.8%**	**28.3%**	**30.7%**	**26.0%**	**26.3%**	**26.2%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 2: CLOTHING & FOOTWEAR - 2019 MARKET SHARE ANALYSIS (%M)

Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	44.9%	28.4%	29.8%	12.6%	39.9%	26.3%	5.2%	0.4%	19.4%	22.3%
Whiteley Town Centre	0.0%	0.0%	0.0%	0.5%	1.3%	2.3%	6.5%	8.4%	2.7%	3.5%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%
New Alresford District Centre	0.3%	2.2%	0.0%	0.0%	4.4%	0.6%	0.0%	0.0%	0.4%	0.6%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.1%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Smaller centres	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	45.6%	30.7%	29.8%	13.1%	45.6%	29.7%	11.6%	9.2%	22.7%	26.6%
Out of Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Andover Road Retail Park	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Easton Lane	1.2%	4.5%	0.0%	0.0%	1.3%	0.6%	0.0%	0.0%	0.6%	0.8%
Other	1.9%	0.6%	3.1%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	0.9%
Sub-Total	3.1%	5.1%	3.1%	1.3%	1.3%	1.1%	0.0%	0.0%	1.6%	1.7%
WINCHESTER DISTRICT	**48.7%**	**35.8%**	**32.9%**	**14.3%**	**46.9%**	**30.8%**	**11.6%**	**9.2%**	**24.3%**	**28.4%**
Basingstoke Town Centre	2.4%	8.4%	0.0%	0.0%	8.3%	4.4%	0.5%	0.0%	1.5%	2.3%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	2.4%	8.4%	0.0%	0.0%	9.0%	4.4%	0.5%	0.0%	1.6%	2.3%
Eastleigh Town Centre	0.8%	4.6%	10.6%	15.0%	1.6%	3.1%	1.2%	0.4%	5.8%	2.2%
Eastleigh Out of Centre	0.0%	0.0%	2.2%	2.4%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%
Sub-Total	0.8%	4.6%	12.8%	17.4%	1.6%	3.1%	1.2%	0.4%	6.6%	2.4%
Fareham Town Centre	0.0%	0.9%	1.2%	0.3%	0.0%	1.7%	11.6%	25.4%	6.6%	8.7%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.2%	0.3%
Sub-Total	0.0%	0.9%	1.2%	0.3%	0.0%	1.7%	11.6%	26.6%	6.9%	9.0%
Southampton City Centre	23.9%	13.3%	16.6%	14.1%	7.5%	14.0%	7.6%	12.5%	14.8%	15.0%
Hedge End Retail Park	2.0%	1.2%	11.1%	17.0%	1.9%	3.7%	9.3%	8.1%	8.9%	5.6%
Other Southampton Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	25.9%	14.5%	27.8%	31.1%	9.4%	17.7%	16.8%	20.5%	23.7%	20.6%
Portsmouth City Centre	0.0%	0.0%	0.0%	1.6%	0.0%	0.6%	3.5%	7.3%	2.3%	2.5%
Out of Centre Portsmouth	0.0%	2.3%	0.0%	0.8%	2.6%	0.0%	0.7%	2.7%	1.1%	1.1%
Sub-Total	0.0%	2.3%	0.0%	2.4%	2.6%	0.6%	4.2%	10.0%	3.4%	3.6%
Alton	0.0%	0.0%	0.0%	0.0%	3.1%	1.4%	0.0%	0.0%	0.2%	0.3%
Andover	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Chandlers Ford	0.0%	0.0%	0.0%	0.5%	0.0%	2.7%	0.0%	0.0%	0.2%	0.3%
Romsey	0.0%	0.0%	0.6%	0.0%	2.5%	0.0%	0.9%	0.0%	0.3%	0.3%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.1%	0.8%	0.8%	1.1%
All Other	2.5%	7.3%	3.1%	1.9%	2.6%	4.3%	4.6%	5.7%	3.6%	4.3%
OUTSIDE WINCHESTER DISTRICT	**31.5%**	**41.8%**	**45.5%**	**53.7%**	**30.8%**	**36.5%**	**44.8%**	**64.1%**	**47.5%**	**44.5%**
SFT/ ONLINE	**19.7%**	**22.4%**	**21.6%**	**32.0%**	**22.3%**	**32.6%**	**43.5%**	**26.7%**	**28.2%**	**27.1%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 3: RECORDING MEDIA- 2019 MARKET SHARE ANALYSIS (%M)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	18.5%	11.4%	24.3%	2.6%	26.1%	11.0%	9.4%	0.0%	9.2%	12.0%
Whiteley Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.6%	0.8%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.2%
New Alresford District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Smaller centres	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Sub-Total	19.7%	11.4%	24.3%	2.6%	26.1%	12.2%	9.4%	3.6%	10.1%	13.2%
Out of Centre:										
Andover Road Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easton Lane	0.0%	1.8%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Other	3.2%	0.0%	3.7%	3.5%	0.0%	1.2%	0.0%	0.0%	2.1%	1.2%
Sub-Total	3.2%	1.8%	5.2%	3.5%	0.0%	1.2%	0.0%	0.0%	2.3%	1.5%
WINCHESTER DISTRICT	**22.9%**	**13.2%**	**29.5%**	**6.1%**	**26.1%**	**13.3%**	**9.4%**	**3.6%**	**12.4%**	**14.7%**
Basingstoke Town Centre	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.9%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.9%
Eastleigh Town Centre	0.5%	1.2%	3.7%	3.4%	0.0%	0.0%	1.2%	0.0%	1.6%	0.8%
Eastleigh Out of Centre	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Sub-Total	0.5%	1.2%	3.7%	4.7%	0.0%	0.0%	1.2%	0.0%	2.0%	0.8%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	16.3%	3.3%	4.7%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	3.0%	1.8%	0.8%	0.9%
Sub-Total	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	8.5%	18.1%	4.2%	5.7%
Southampton City Centre	1.5%	6.4%	0.0%	5.0%	0.0%	0.0%	0.0%	2.2%	2.8%	1.4%
Hedge End Retail Park	0.0%	1.2%	0.0%	1.3%	0.0%	3.0%	0.0%	3.1%	1.1%	1.2%
Other Southampton Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	1.5%	7.7%	0.0%	6.4%	0.0%	3.0%	0.0%	5.4%	3.9%	2.7%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.9%	0.3%	0.4%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.9%	0.3%	0.4%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.2%
Andover	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Chandlers Ford	0.0%	0.0%	3.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Romsey	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	3.7%	3.4%	0.9%	1.6%
All Other	0.7%	0.0%	0.0%	0.0%	0.0%	1.2%	3.0%	0.9%	0.6%	1.0%
OUTSIDE WINCHESTER DISTRICT	**2.7%**	**21.4%**	**9.0%**	**13.2%**	**0.0%**	**6.5%**	**17.7%**	**28.6%**	**13.5%**	**13.9%**
SFT/ ONLINE	**74.4%**	**65.3%**	**61.5%**	**80.7%**	**73.9%**	**80.1%**	**72.9%**	**67.9%**	**74.1%**	**71.4%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 4: BOOKS, STATIONERY - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	48.4%	51.9%	35.3%	7.2%	38.6%	15.3%	6.0%	1.2%	20.6%	25.4%
Whiteley Town Centre	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	2.2%	4.1%	1.6%	1.3%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.4%	0.0%	1.3%	9.1%	0.0%	1.2%	1.6%
New Alresford District Centre	0.3%	0.0%	0.0%	0.0%	20.6%	6.8%	0.0%	0.0%	1.1%	2.1%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%	0.1%
Local Centres	0.0%	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Smaller centres	0.3%	2.8%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Sub-Total	49.1%	55.5%	36.7%	9.4%	59.2%	23.4%	17.3%	5.7%	25.0%	31.0%
Out of Centre:										
Andover Road Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easton Lane	3.9%	4.8%	0.0%	0.6%	4.1%	3.2%	0.0%	0.0%	1.5%	2.0%
Other	2.5%	0.0%	11.1%	0.4%	0.0%	1.7%	0.0%	0.0%	1.4%	1.8%
Sub-Total	6.4%	4.8%	11.1%	0.9%	4.1%	4.8%	0.0%	0.0%	2.9%	3.9%
WINCHESTER DISTRICT	**55.5%**	**60.3%**	**47.8%**	**10.4%**	**63.2%**	**28.2%**	**17.3%**	**5.7%**	**27.9%**	**34.9%**
Basingstoke Town Centre	0.0%	0.0%	0.7%	0.0%	3.0%	5.1%	0.0%	0.0%	0.3%	0.8%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.7%	0.0%	3.0%	5.1%	0.0%	0.0%	0.3%	0.8%
Eastleigh Town Centre	0.0%	1.9%	10.1%	34.4%	0.0%	2.0%	1.7%	0.0%	10.7%	1.6%
Eastleigh Out of Centre	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Sub-Total	0.0%	1.9%	10.1%	34.7%	0.0%	2.0%	1.7%	0.0%	10.8%	1.6%
Fareham Town Centre	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	15.6%	30.8%	8.0%	9.6%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	1.6%	1.9%	0.7%	0.7%
Sub-Total	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	17.2%	32.7%	8.8%	10.3%
Southampton City Centre	0.0%	0.7%	1.3%	1.7%	0.0%	0.0%	0.5%	1.7%	1.0%	0.7%
Hedge End Retail Park	0.0%	0.0%	0.0%	1.7%	0.0%	2.3%	3.3%	2.5%	1.4%	1.4%
Other Southampton Out of Centre	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Sub-Total	0.0%	0.7%	1.3%	4.7%	0.0%	2.3%	3.9%	4.2%	2.8%	2.1%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.5%	0.6%	0.7%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.5%	0.6%	0.7%
Alton	0.0%	0.0%	0.0%	0.0%	1.9%	0.7%	0.0%	0.0%	0.1%	0.2%
Andover	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Chandlers Ford	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	2.8%	1.9%	2.4%
All Other	0.5%	0.0%	0.7%	3.9%	0.0%	16.1%	2.2%	1.2%	2.1%	2.7%
OUTSIDE WINCHESTER DISTRICT	**0.5%**	**4.1%**	**12.8%**	**50.1%**	**4.8%**	**26.1%**	**36.4%**	**43.5%**	**29.0%**	**20.9%**
SFT/ ONLINE	**44.0%**	**35.6%**	**39.5%**	**39.6%**	**31.9%**	**45.6%**	**46.3%**	**50.8%**	**43.1%**	**44.2%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 5: PERSONAL CARE GOODS INCLUDING COSMETICS, MEDICAL GOODS, PERSONAL APPLIANCES ETC. - 2019 MARKET SHARE ANALYSIS (%M)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	69.1%	46.3%	28.3%	4.1%	24.4%	15.0%	4.4%	0.0%	20.5%	27.1%
Whiteley Town Centre	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	5.9%	12.6%	4.0%	4.1%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.5%	0.0%	8.3%	35.2%	0.0%	4.6%	6.7%
New Alresford District Centre	0.7%	0.0%	0.0%	0.0%	39.1%	12.8%	0.0%	0.0%	2.1%	3.9%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.2%	6.8%	1.6%	2.0%
Local Centres	0.0%	18.5%	2.4%	0.0%	0.7%	0.0%	7.8%	0.0%	2.3%	3.1%
Smaller centres	6.1%	9.0%	8.7%	0.3%	3.9%	8.8%	0.5%	0.0%	2.8%	4.3%
Sub-Total	75.9%	73.8%	39.4%	7.1%	68.0%	46.3%	55.1%	19.4%	37.9%	51.4%
Out of Centre:										0.0%
Andover Road Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easton Lane	6.7%	12.7%	2.2%	1.6%	23.0%	10.8%	0.0%	0.0%	3.9%	5.5%
Other	5.8%	2.8%	29.2%	0.6%	0.7%	2.6%	0.0%	0.0%	3.4%	4.6%
Sub-Total	12.4%	15.5%	31.4%	2.3%	23.7%	13.4%	0.0%	0.0%	7.3%	10.1%
WINCHESTER DISTRICT	**88.4%**	**89.2%**	**70.8%**	**9.4%**	**91.7%**	**59.7%**	**55.1%**	**19.4%**	**45.2%**	**61.4%**
Basingstoke Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.1%	0.5%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.7%	4.5%	0.0%	0.0%	0.1%	0.5%
Eastleigh Town Centre	1.4%	0.0%	11.6%	33.4%	0.0%	2.0%	0.7%	0.0%	11.0%	1.7%
Eastleigh Out of Centre	0.0%	0.0%	0.6%	4.3%	0.0%	0.0%	0.0%	0.0%	1.3%	0.1%
Sub-Total	1.4%	0.0%	12.2%	37.7%	0.0%	2.0%	0.7%	0.0%	12.3%	1.8%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	45.5%	10.6%	12.9%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.6%	1.5%	15.1%	3.6%	4.0%
Sub-Total	0.0%	0.0%	0.0%	0.8%	0.0%	0.6%	11.5%	60.6%	14.2%	16.9%
Southampton City Centre	1.4%	0.0%	4.6%	1.6%	2.6%	5.9%	0.0%	2.6%	1.8%	2.2%
Hedge End Retail Park	0.4%	0.9%	0.6%	5.0%	0.0%	2.9%	8.3%	6.4%	4.0%	3.5%
Other Southampton Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	1.7%	0.9%	5.3%	6.6%	2.6%	8.8%	8.3%	8.9%	5.8%	5.7%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.1%
Sub-Total	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.4%	0.3%	0.1%
Alton	0.0%	0.9%	0.0%	0.0%	3.1%	0.6%	0.0%	0.0%	0.2%	0.3%
Andover	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Chandlers Ford	0.0%	0.0%	3.1%	15.4%	0.0%	0.0%	0.7%	0.0%	4.8%	0.4%
Romsey	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	15.4%	2.8%	2.4%	3.3%
All Other	0.0%	2.4%	0.6%	16.6%	0.0%	20.0%	1.2%	1.8%	6.1%	3.1%
OUTSIDE WINCHESTER DISTRICT	**3.1%**	**8.6%**	**21.2%**	**78.4%**	**6.3%**	**37.1%**	**37.9%**	**74.6%**	**46.8%**	**32.4%**
SFT/ ONLINE	**8.6%**	**2.2%**	**8.0%**	**12.2%**	**2.0%**	**3.2%**	**7.1%**	**6.0%**	**8.1%**	**6.1%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 6: AUDIO VISUAL AND DOMESTIC APPLICANCES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	12.6%	3.7%	2.7%	0.8%	6.1%	2.4%	0.0%	0.0%	3.5%	4.1%
Whiteley Town Centre	1.3%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	1.3%	0.8%	0.6%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.7%	0.0%	4.2%	17.6%	1.6%	2.5%	3.9%
New Alresford District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.4%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%
Smaller centres	0.5%	2.8%	0.0%	0.0%	2.6%	1.6%	0.0%	0.0%	0.4%	0.7%
Sub-Total	14.9%	6.5%	2.7%	3.2%	8.7%	8.7%	17.6%	2.8%	7.6%	9.5%
Out of Centre:										0.0%
Andover Road Retail Park	0.0%	2.9%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.2%	0.3%
Easton Lane	19.1%	25.5%	10.6%	0.5%	35.8%	16.1%	0.6%	0.0%	8.2%	11.6%
Other	2.6%	3.0%	5.0%	1.2%	0.0%	0.0%	0.0%	0.0%	1.4%	1.3%
Sub-Total	21.7%	31.4%	15.6%	1.7%	36.5%	16.1%	0.6%	0.0%	9.8%	13.2%
WINCHESTER DISTRICT	**36.5%**	**37.9%**	**18.3%**	**4.9%**	**45.2%**	**24.9%**	**18.3%**	**2.8%**	**17.4%**	**22.7%**
Basingstoke Town Centre	0.0%	1.9%	0.0%	0.0%	1.9%	2.4%	0.0%	0.0%	0.2%	0.5%
Brighton Hill Retail Park	1.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	1.3%	3.3%	0.0%	0.0%	1.9%	2.4%	0.0%	0.0%	0.6%	1.0%
Eastleigh Town Centre	0.0%	0.0%	1.3%	5.8%	0.0%	0.0%	0.0%	0.0%	1.9%	0.1%
Eastleigh Out of Centre	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Sub-Total	0.0%	0.0%	1.3%	7.4%	0.0%	0.0%	0.0%	0.0%	2.4%	0.1%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	8.8%	1.8%	2.6%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	22.4%	4.4%	6.3%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	31.2%	6.3%	9.0%
Southampton City Centre	14.7%	11.5%	16.5%	11.0%	17.6%	15.8%	7.9%	6.5%	11.4%	11.7%
Hedge End Retail Park	1.7%	3.7%	14.7%	36.8%	2.6%	8.9%	19.6%	13.9%	18.1%	10.0%
Other Southampton Out of Centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.6%	0.0%	0.3%	0.1%
Sub-Total	16.4%	15.2%	31.2%	48.7%	20.2%	24.7%	28.1%	20.4%	29.9%	21.7%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.1%	0.2%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.5%	0.5%	0.3%	0.5%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	2.7%	0.5%	0.4%	0.7%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%
Andover	1.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Chandlers Ford	0.0%	0.0%	0.7%	2.4%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	7.5%	2.0%	1.2%	1.9%
All Other	0.0%	0.7%	0.0%	0.0%	0.0%	2.2%	5.7%	2.1%	1.1%	1.8%
OUTSIDE WINCHESTER DISTRICT	**19.1%**	**20.4%**	**33.1%**	**58.6%**	**22.1%**	**31.7%**	**50.3%**	**56.2%**	**43.1%**	**36.7%**
SFT/ ONLINE	**44.3%**	**41.7%**	**48.6%**	**36.6%**	**32.7%**	**43.4%**	**31.4%**	**40.9%**	**39.5%**	**40.6%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 7: JEWELLERY, WATCHES, CHINA, GIFTS, AND OTHER - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	47.4%	32.7%	44.0%	7.8%	29.9%	21.4%	7.3%	0.9%	18.8%	23.5%
Whiteley Town Centre	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	6.0%	13.3%	4.3%	4.4%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.5%	0.8%
New Alresford District Centre	0.0%	0.0%	0.0%	0.0%	13.3%	3.4%	1.3%	0.0%	0.6%	1.3%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%
Smaller centres	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Sub-Total	47.4%	36.6%	44.0%	10.7%	43.3%	24.8%	19.4%	14.1%	24.7%	30.3%
Out of Centre:										0.0%
Andover Road Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easton Lane	2.0%	11.2%	1.0%	1.4%	4.0%	1.3%	0.0%	0.0%	1.7%	2.0%
Other	6.4%	1.5%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.9%
Sub-Total	8.5%	12.7%	3.6%	1.4%	4.0%	1.3%	0.0%	0.0%	3.2%	3.8%
WINCHESTER DISTRICT	**55.8%**	**49.4%**	**47.6%**	**12.1%**	**47.3%**	**26.1%**	**19.4%**	**14.1%**	**28.0%**	**34.2%**
Basingstoke Town Centre	0.0%	0.0%	0.0%	0.0%	2.4%	10.4%	0.0%	0.0%	0.2%	1.2%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.0%	0.0%	2.4%	10.4%	0.0%	0.0%	0.2%	1.2%
Eastleigh Town Centre	0.0%	0.0%	5.1%	27.1%	1.6%	5.1%	2.2%	0.0%	8.4%	1.5%
Eastleigh Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	5.1%	27.1%	1.6%	5.1%	2.2%	0.0%	8.4%	1.5%
Fareham Town Centre	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	9.4%	35.5%	9.4%	10.5%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.4%	0.4%
Sub-Total	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	9.4%	37.2%	9.8%	10.9%
Southampton City Centre	17.4%	12.6%	15.9%	26.3%	18.2%	17.0%	12.1%	12.7%	17.9%	14.7%
Hedge End Retail Park	0.0%	4.0%	2.0%	8.3%	0.0%	0.0%	6.5%	2.6%	4.1%	2.3%
Other Southampton Out of Centre	2.0%	1.5%	6.6%	3.2%	10.2%	5.4%	0.0%	0.6%	2.4%	2.5%
Sub-Total	19.4%	18.1%	24.5%	37.8%	28.4%	22.4%	18.6%	15.9%	24.3%	19.5%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	2.3%	1.1%	1.4%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	1.3%	0.0%	0.2%	0.6%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	6.1%	2.3%	1.3%	2.0%
Alton	0.0%	0.0%	0.0%	0.0%	1.6%	1.3%	0.0%	0.0%	0.1%	0.2%
Andover	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Chandlers Ford	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.6%	2.2%	0.8%	1.1%
All Other	5.3%	7.0%	3.6%	2.7%	1.6%	15.5%	12.2%	7.1%	5.8%	7.8%
OUTSIDE WINCHESTER DISTRICT	**24.7%**	**27.6%**	**33.3%**	**70.3%**	**35.5%**	**59.6%**	**51.1%**	**64.7%**	**51.5%**	**44.6%**
SFT/ ONLINE	**19.5%**	**23.1%**	**19.1%**	**17.6%**	**17.3%**	**14.3%**	**29.5%**	**21.1%**	**20.5%**	**21.3%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 8: PETS, SPORTS, HOBBIES, BIKES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	29.1%	34.0%	12.4%	2.4%	23.7%	2.8%	1.0%	0.9%	10.7%	12.4%
Whiteley Town Centre	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	1.3%	1.6%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.7%	0.0%	0.2%	0.4%
New Alresford District Centre	0.0%	0.0%	0.0%	0.0%	6.5%	2.4%	0.0%	0.0%	0.3%	0.7%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.9%	0.4%	0.5%
Local Centres	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Smaller centres	0.0%	2.3%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.2%	0.6%
Sub-Total	30.9%	36.2%	14.5%	2.4%	30.1%	9.0%	4.4%	6.6%	13.2%	16.4%
Out of Centre:										0.0%
Andover Road Retail Park	4.4%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.1%
Easton Lane / Winnall	8.8%	5.7%	4.5%	1.1%	11.0%	16.5%	0.0%	0.0%	3.5%	5.6%
Other	1.1%	1.9%	9.1%	1.5%	1.1%	0.0%	0.0%	0.0%	1.5%	1.3%
Sub-Total	14.3%	10.3%	13.7%	2.6%	12.1%	16.5%	0.0%	0.0%	6.0%	8.0%
WINCHESTER DISTRICT	**45.2%**	**46.5%**	**28.2%**	**5.0%**	**42.2%**	**25.6%**	**4.4%**	**6.6%**	**19.2%**	**24.4%**
Basingstoke Town Centre	1.8%	0.8%	0.0%	0.0%	2.7%	3.8%	0.0%	0.0%	0.6%	1.1%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	1.8%	0.8%	0.0%	0.0%	2.7%	3.8%	0.0%	0.0%	0.6%	1.1%
Eastleigh Town Centre	1.7%	7.5%	7.8%	19.2%	0.0%	0.0%	0.0%	0.6%	7.2%	1.9%
Eastleigh Out of Centre	0.0%	0.0%	14.2%	5.6%	0.0%	1.6%	0.0%	0.0%	2.7%	1.4%
Sub-Total	1.7%	7.5%	22.0%	24.8%	0.0%	1.6%	0.0%	0.6%	9.8%	3.3%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	20.9%	4.9%	6.3%
Fareham Out of Centre	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	3.1%	7.1%	1.9%	2.5%
Sub-Total	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	9.1%	28.1%	6.8%	8.8%
Southampton City Centre	8.2%	3.7%	0.0%	4.1%	14.6%	2.8%	2.7%	3.2%	4.6%	4.6%
Hedge End Retail Park	0.0%	1.9%	9.1%	19.3%	1.1%	8.7%	13.3%	7.4%	9.7%	6.3%
Other Southampton Out of Centre	0.0%	0.0%	1.6%	1.3%	0.0%	0.0%	0.7%	2.0%	1.0%	0.8%
Sub-Total	8.2%	5.6%	10.7%	24.7%	15.6%	11.5%	16.7%	12.6%	15.3%	11.7%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	3.5%	1.0%	1.3%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	3.5%	1.0%	1.3%
Alton	0.0%	0.0%	0.0%	0.0%	1.1%	0.8%	0.0%	0.0%	0.1%	0.2%
Andover	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Chandlers Ford	0.0%	0.0%	0.8%	2.2%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	16.9%	0.0%	2.1%	3.0%
All Other	0.0%	0.0%	0.0%	3.7%	1.1%	14.7%	4.7%	8.9%	3.8%	5.1%
OUTSIDE WINCHESTER DISTRICT	**11.8%**	**16.5%**	**35.6%**	**55.4%**	**20.4%**	**33.6%**	**50.2%**	**53.7%**	**40.3%**	**34.8%**
SFT/ ONLINE	**43.0%**	**37.0%**	**36.2%**	**39.6%**	**37.4%**	**40.8%**	**45.4%**	**39.7%**	**40.5%**	**40.8%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 9: FURNITURE, FLOOR COVERINGS, HOUSEHOLD TEXTILES - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	8.7%	11.3%	5.6%	1.0%	2.8%	5.0%	5.1%	0.0%	3.8%	5.1%
Whiteley Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.4%	0.6%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.1%
New Alresford District Centre	0.4%	0.9%	0.0%	0.0%	13.5%	1.7%	0.0%	0.0%	0.7%	1.2%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	0.0%	0.0%	0.6%	0.9%	0.8%	0.0%	0.0%	0.2%	0.1%
Smaller centres	1.3%	0.9%	3.1%	1.0%	0.9%	2.1%	0.0%	0.0%	0.9%	1.0%
Sub-Total	10.4%	13.1%	8.7%	2.6%	18.1%	9.7%	5.1%	2.9%	6.3%	8.2%
Out of Centre:										0.0%
Andover Road Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Easton Lane	2.1%	2.8%	2.0%	1.0%	7.7%	1.3%	0.0%	0.0%	1.4%	1.5%
Other	0.0%	0.0%	0.8%	0.0%	0.9%	0.0%	0.0%	0.0%	0.1%	0.1%
Sub-Total	2.1%	2.8%	2.8%	1.0%	8.6%	1.3%	0.0%	0.0%	1.5%	1.7%
WINCHESTER DISTRICT	**12.6%**	**15.9%**	**11.5%**	**3.6%**	**26.7%**	**10.9%**	**5.1%**	**2.9%**	**7.7%**	**9.8%**
Basingstoke Town Centre	0.0%	1.4%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.1%	0.2%
Brighton Hill Retail Park	1.6%	11.7%	0.0%	0.0%	0.9%	3.3%	0.0%	0.0%	1.1%	1.8%
Other Basingtoke Out of Centre	0.0%	0.0%	0.0%	3.0%	0.9%	0.0%	0.0%	0.0%	1.0%	0.1%
Sub-Total	1.6%	13.1%	0.0%	3.0%	3.2%	3.3%	0.0%	0.0%	2.2%	2.1%
Eastleigh Town Centre	3.8%	0.9%	2.0%	8.8%	0.0%	0.8%	1.1%	0.0%	3.9%	1.4%
Eastleigh Out of Centre	2.1%	0.9%	6.8%	5.0%	2.3%	0.8%	0.0%	0.0%	2.6%	1.4%
Sub-Total	5.9%	1.8%	8.7%	13.8%	2.3%	1.7%	1.1%	0.0%	6.5%	2.9%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	12.9%	2.6%	3.4%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	3.9%	0.9%	1.2%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	16.7%	3.4%	4.6%
Southampton City Centre	19.9%	25.2%	24.4%	9.4%	25.6%	18.7%	10.5%	12.2%	14.9%	17.5%
Hedge End Retail Park	14.7%	23.8%	19.1%	35.6%	12.6%	20.8%	30.0%	27.0%	26.3%	22.1%
Other Southampton Out of Centre	22.3%	2.8%	10.2%	6.6%	4.4%	12.3%	2.8%	10.2%	10.0%	11.0%
Sub-Total	57.0%	51.8%	53.6%	51.7%	42.7%	51.8%	43.3%	49.4%	51.1%	50.6%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	2.4%	0.8%	1.1%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%	0.2%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	3.3%	1.0%	1.3%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Andover	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Chandlers Ford	2.5%	3.2%	10.6%	11.6%	7.7%	0.8%	0.0%	0.9%	5.6%	2.7%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.0%	4.4%	2.7%	3.9%
All Other	1.6%	0.0%	3.9%	1.4%	3.3%	6.8%	8.0%	5.9%	3.3%	4.5%
OUTSIDE WINCHESTER DISTRICT	**68.7%**	**72.2%**	**76.9%**	**81.4%**	**59.2%**	**65.3%**	**75.7%**	**80.7%**	**76.1%**	**72.9%**
SFT/ ONLINE	**18.8%**	**11.9%**	**11.6%**	**15.0%**	**14.1%**	**23.8%**	**19.2%**	**16.4%**	**16.2%**	**17.2%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 10: DIY, GARDENING - 2019 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Study Area	Study Area excl Eastleigh (Zone 4)
Winchester Town Centre	12.5%	7.6%	1.7%	0.3%	10.5%	0.9%	0.9%	0.0%	3.4%	4.3%
Whiteley Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.9%	1.5%
New Alresford District Centre	0.8%	0.0%	0.0%	0.0%	9.0%	3.4%	0.0%	0.0%	0.6%	1.2%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.3%	0.3%	0.4%
Local Centres	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.3%	0.5%
Smaller centres	5.1%	11.2%	7.0%	0.0%	3.6%	2.1%	0.9%	1.1%	2.6%	3.7%
Sub-Total	18.5%	19.4%	8.7%	0.3%	23.1%	6.4%	13.1%	2.4%	8.1%	11.5%
Out of Centre:										0.0%
Andover Road Retail Park	1.3%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.3%	0.4%
Easton Lane	3.9%	10.4%	1.3%	0.0%	6.7%	11.7%	0.9%	0.4%	2.1%	4.1%
Other	51.8%	52.2%	27.8%	0.8%	53.3%	30.3%	1.5%	0.0%	17.4%	25.4%
Sub-Total	57.0%	62.6%	29.2%	0.8%	62.8%	42.0%	2.4%	0.4%	19.8%	29.9%
WINCHESTER DISTRICT	**75.5%**	**82.1%**	**37.8%**	**1.1%**	**85.9%**	**48.4%**	**15.6%**	**2.9%**	**28.0%**	**41.4%**
Basingstoke Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brighton Hill Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.1%	0.4%
Other Basingtoke Out of Centre	1.6%	3.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.5%	0.6%
Sub-Total	1.6%	3.1%	0.0%	0.0%	0.7%	3.3%	0.0%	0.0%	0.6%	1.1%
Eastleigh Town Centre	0.4%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%
Eastleigh Out of Centre	14.0%	8.2%	47.8%	55.0%	4.1%	9.8%	0.0%	1.7%	24.5%	10.0%
Sub-Total	14.4%	8.2%	47.8%	57.3%	4.1%	9.8%	0.0%	1.7%	25.3%	10.1%
Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	7.5%	1.8%	2.2%
Fareham Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.0%	3.3%	3.9%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	23.5%	5.1%	6.1%
Southampton City Centre	1.6%	0.0%	2.4%	0.0%	0.0%	3.4%	0.0%	2.8%	1.1%	1.7%
Hedge End Retail Park	0.0%	1.0%	9.3%	34.1%	0.7%	23.5%	58.6%	25.1%	23.6%	20.5%
Other Southampton Out of Centre	4.5%	2.5%	0.0%	0.0%	0.0%	0.9%	0.0%	1.3%	1.2%	1.5%
Sub-Total	6.1%	3.5%	11.7%	34.1%	0.7%	27.7%	58.6%	29.2%	25.9%	23.7%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%	0.2%
Out of Centre Portsmouth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%	0.2%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.3%	0.3%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Andover	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Chandlers Ford	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Romsey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	5.5%	1.3%	0.9%	1.4%
All Other	0.4%	0.0%	2.7%	4.6%	4.9%	6.7%	16.1%	37.1%	11.5%	13.4%
OUTSIDE WINCHESTER DISTRICT	**22.5%**	**17.3%**	**62.2%**	**96.8%**	**10.5%**	**48.3%**	**82.3%**	**94.2%**	**69.9%**	**56.4%**
SFT/ ONLINE	**2.0%**	**0.6%**	**0.0%**	**2.1%**	**3.6%**	**3.3%**	**2.1%**	**2.9%**	**2.1%**	**2.2%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

6. Convenience Goods Turnover (excluding SFT)

Lambert Smith Hampton

TABLE 1: ALL CONVENIENCE GOODS - 2019 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Excluding Eastleigh (Zone 4)
WinchesterTown										
Co op, City Road, Winchester	1.0%	0.0%	0.0%	0.1%	0.0%	0.5%	0.0%	0.0%	0.3%	0.3%
Iceland, Middle Brook Street, Winchester	4.0%	0.5%	0.0%	0.0%	0.1%	1.1%	0.0%	0.0%	0.8%	1.2%
Marks & Spencer Foodhall, High Street, Winchester	4.6%	0.5%	2.2%	0.4%	1.5%	0.0%	0.2%	0.1%	1.2%	1.5%
M&S Simply Food, Winchester Rail Station, Winchester	0.4%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.1%	0.2%
Sainsbury's Superstore, Middlebrook Street, Winchester	12.2%	3.2%	0.6%	0.0%	0.0%	3.4%	0.0%	0.0%	2.6%	3.7%
Tesco Express, High Street, Winchester	3.3%	0.4%	0.2%	0.0%	0.0%	1.7%	0.0%	0.0%	0.7%	1.0%
Other	1.4%	0.7%	0.6%	0.0%	0.5%	0.2%	0.0%	0.0%	0.4%	0.5%
Sub-Total	27.0%	5.2%	3.6%	0.5%	2.1%	7.8%	0.2%	0.1%	6.1%	8.4%
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.7%	0.1%	0.2%
Lidl, Rookery Avenue, Solent Way, Whiteley	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	1.9%	2.8%	1.0%	1.0%
Tesco Superstore, Whiteley Way, Whiteley	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%	7.3%	1.4%	2.0%
Sub-Total	0.0%	0.0%	0.0%	0.9%	0.0%	0.3%	2.7%	10.7%	2.6%	3.2%
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	0.3%	0.5%	0.0%	0.2%	0.0%	2.3%	10.2%	0.7%	1.6%	2.2%
Co-op, High Street, Bishop's Waltham	0.0%	0.1%	0.0%	0.0%	0.0%	1.3%	12.6%	0.5%	1.6%	2.3%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	3.4%	0.0%	0.4%	0.6%
Sub-Total	0.3%	0.7%	0.0%	0.2%	0.0%	4.1%	26.2%	1.1%	3.6%	5.1%
New Alresford District Centre										
Co-op, West Street, Alresford	0.3%	0.0%	0.0%	0.0%	17.7%	3.6%	0.0%	0.0%	1.0%	1.5%
Tesco Express, Broad Street, Alresford	0.2%	0.0%	0.0%	0.0%	15.8%	3.7%	0.0%	0.0%	1.0%	1.4%
Other	0.0%	0.0%	0.0%	0.0%	3.8%	0.3%	0.0%	0.0%	0.2%	0.3%
Sub-Total	0.5%	0.0%	0.0%	0.0%	37.3%	7.6%	0.0%	0.0%	2.2%	3.1%
Wickham District Centre										
Co-op, The Square, Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.5%	4.2%	1.0%	1.3%
Other	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.3%	1.1%	0.3%	0.3%
Sub-Total	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	1.8%	5.3%	1.2%	1.7%
Weeke Local Centre										
Aldi, Burnett Close, Winchester	15.6%	22.1%	2.3%	0.0%	3.5%	3.9%	0.1%	0.0%	4.6%	6.6%
Waitrose, Stockbridge Road, Winchester	12.8%	14.6%	4.2%	0.0%	1.3%	0.0%	1.4%	0.0%	3.6%	5.0%
Other	0.9%	1.7%	0.0%	0.1%	0.3%	0.0%	0.5%	0.0%	0.4%	0.5%
Sub-Total	29.3%	38.3%	6.5%	0.1%	5.1%	3.9%	2.0%	0.0%	8.6%	12.0%
Smaller Centres										
Badger Farm Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oliver's Battery Local Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Denmead Local Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.4%	0.6%
Kings Worthy Local Centre	0.1%	10.5%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.7%	0.9%
Stockbridge Road/Andover Road Local Centre	2.3%	0.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.6%
Village centres/ neighbourhood stores	3.3%	3.9%	13.8%	0.3%	0.2%	7.1%	2.8%	0.7%	2.7%	3.8%
Sub-Total	5.7%	14.6%	14.7%	0.3%	0.6%	7.1%	6.5%	0.7%	4.3%	5.9%
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	15.7%	6.2%	41.9%	4.2%	8.3%	7.1%	1.1%	0.0%	7.9%	9.4%
Tesco Extra, Easton Lane, Winchester	16.0%	26.5%	3.9%	2.3%	30.6%	22.4%	1.8%	0.1%	8.5%	11.0%
Other	0.1%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
Sub-Total	31.8%	33.2%	45.8%	6.5%	38.9%	29.7%	2.9%	0.1%	16.4%	20.5%
WINCHESTER DISTRICT	**94.6%**	**92.1%**	**70.6%**	**8.7%**	**84.0%**	**60.9%**	**42.3%**	**18.1%**	**45.0%**	**60.0%**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	1.2%	0.0%	3.0%	7.1%	0.0%	0.4%	0.1%	0.0%	2.5%	0.6%
Asda, Bournemouth Road, Chandler's Ford	2.2%	1.6%	4.7%	14.7%	0.4%	1.3%	0.7%	1.0%	5.4%	1.6%
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	0.5%	0.0%	8.3%	8.6%	1.5%	1.4%	0.1%	0.6%	3.4%	1.2%
Other	0.9%	0.0%	0.5%	5.2%	0.0%	0.0%	0.0%	0.4%	1.8%	0.4%
Sub-Total	4.7%	1.6%	16.5%	35.7%	2.0%	3.1%	1.0%	2.0%	13.1%	3.8%
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	0.0%	0.4%	2.2%	5.4%	0.2%	1.7%	1.0%	0.0%	2.0%	0.6%
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	0.0%	0.0%	0.7%	1.2%	0.0%	0.0%	0.2%	0.0%	0.4%	0.1%
Sainsbury's Superstore, Leigh Road, Eastleigh	0.0%	0.0%	1.2%	6.5%	0.0%	0.3%	0.5%	0.0%	2.0%	0.2%
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.0%	0.0%	2.5%	7.3%	0.0%	0.5%	0.0%	0.0%	2.3%	0.3%
Other Eastleigh Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sub-Total	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Fareham Town Centre										
Aldi, West Street, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	14.5%	3.0%	4.2%
Asda, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	3.9%	0.9%	1.2%
Lidl, Speedfields Park, Newgate Lane, Fareham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%	0.2%
Tesco Superstore, Quay Street, Fareham	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	2.2%	5.8%	1.3%	1.8%
Other Fareham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	1.2%	0.3%	0.4%
Sainsbury's Superstore, Wallington Way,Fareham	0.0%	0.0%	0.0%	0.8%	0.0%	1.0%	7.8%	28.4%	6.4%	8.7%
Sub-Total	0.0%	0.0%	0.0%	0.9%	0.0%	1.2%	14.5%	54.6%	11.9%	16.5%
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	0.2%	0.1%	2.5%	9.8%	0.0%	3.3%	13.4%	5.5%	5.8%	4.2%
Other Hedge End	0.1%	0.0%	0.8%	1.4%	0.0%	0.9%	1.4%	2.3%	1.1%	1.0%
Sub-Total	0.3%	0.1%	3.2%	11.2%	0.0%	4.3%	14.8%	7.8%	6.9%	5.2%
Alton	0.0%	0.0%	0.0%	0.0%	11.3%	2.1%	0.0%	0.0%	0.6%	0.9%
Andover	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%
Basingstoke	0.0%	0.8%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.3%	0.4%
Southampton	0.2%	0.0%	0.0%	3.5%	0.0%	2.4%	0.2%	1.2%	1.5%	0.6%
Portsmouth	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	2.5%	0.7%	0.6%	0.6%
Romsey	0.1%	0.0%	0.5%	0.4%	0.0%	1.3%	0.0%	0.0%	0.3%	0.2%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	18.3%	2.2%	2.5%	3.5%
Other	0.1%	1.4%	2.2%	17.7%	2.5%	19.1%	4.6%	13.5%	9.9%	6.7%
OUTSIDE OF WINCHESTER DISTRICT	**5.4%**	**7.9%**	**29.4%**	**91.3%**	**16.0%**	**39.1%**	**57.7%**	**81.9%**	**55.0%**	**40.0%**
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 2: 2019 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
TOTAL AVAILABLE SPEND (excluding SFT):	£93.67	£31.59	£32.45	£155.82	£21.75	£40.76	£60.59	£94.16	£530.80	£374.97
WinchesterTown										
Co op, City Road, Winchester	£1.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£1.3	£1.2
Iceland, Middle Brook Street, Winchester	£3.8	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£4.3	£4.3
Marks & Spencer Foodhall, High Street, Winchester	£4.3	£0.1	£0.7	£0.6	£0.3	£0.0	£0.1	£0.1	£6.3	£5.7
M&S Simply Food, Winchester Rail Station, Winchester	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.7	£0.7
Sainsbury's Superstore, Middlebrook Street, Winchester	£11.5	£1.0	£0.2	£0.0	£0.0	£1.4	£0.0	£0.0	£13.9	£13.9
Tesco Express, High Street, Winchester	£3.1	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£3.9	£3.9
Other	£1.3	£0.2	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£1.9	£1.9
Sub-Total	£25.3	£1.7	£1.2	£0.8	£0.5	£3.2	£0.1	£0.1	£32.4	£31.6
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.8	£0.8
Lidl, Rookery Avenue, Solent Way, Whiteley	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£1.2	£2.6	£5.3	£3.8
Tesco Superstore, Whiteley Way, Whiteley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£6.9	£7.5	£7.5
Sub-Total	£0.0	£0.0	£0.0	£1.4	£0.0	£0.1	£1.6	£10.1	£13.5	£12.1
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	£0.3	£0.2	£0.0	£0.3	£0.0	£1.0	£6.2	£0.6	£8.5	£8.2
Co-op, High Street, Bishop's Waltham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£7.6	£0.4	£8.6	£8.6
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.1	£0.0	£2.2	£2.2
Sub-Total	£0.3	£0.2	£0.0	£0.3	£0.0	£1.7	£15.9	£1.1	£19.4	£19.0
New Alresford District Centre										
Co-op, West Street, Alresford	£0.3	£0.0	£0.0	£0.0	£3.8	£1.5	£0.0	£0.0	£5.6	£5.6
Tesco Express, Broad Street, Alresford	£0.2	£0.0	£0.0	£0.0	£3.4	£1.5	£0.0	£0.0	£5.1	£5.1
Other	£0.0	£0.0	£0.0	£0.0	£0.8	£0.1	£0.0	£0.0	£1.0	£1.0
Sub-Total	£0.4	£0.0	£0.0	£0.0	£8.1	£3.1	£0.0	£0.0	£11.7	£11.7
Wickham District Centre										
Co-op, The Square, Wickham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.9	£3.9	£5.1	£5.1
Other	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£1.1	£1.4	£1.3
Sub-Total	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1	£1.1	£5.0	£6.5	£6.3
Weeke Local Centre										
Aldi, Burnett Close, Winchester	£14.6	£7.0	£0.8	£0.0	£0.8	£1.6	£0.1	£0.0	£24.6	£24.6
Waitrose, Stockbridge Road, Winchester	£12.0	£4.6	£1.3	£0.0	£0.3	£0.0	£0.8	£0.0	£18.9	£18.9
Other	£0.8	£0.5	£0.0	£0.2	£0.1	£0.0	£0.3	£0.0	£1.9	£1.7
Sub-Total	£27.4	£12.1	£2.1	£0.2	£1.1	£1.6	£1.2	£0.0	£45.5	£45.3
Smaller Centres										
Badger Farm Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Denmead Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.0	£2.2	£2.2
Kings Worthy Local Centre	£0.1	£3.3	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£3.5	£3.5
Stockbridge Road/Andover Road Local Centre	£2.1	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4	£2.4
Village centres/ neighbourhood stores	£3.1	£1.2	£4.5	£0.5	£0.0	£2.9	£1.7	£0.7	£14.6	£14.1
Sub-Total	£5.4	£4.6	£4.8	£0.5	£0.1	£2.9	£3.9	£0.7	£22.8	£22.4
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	£14.7	£2.0	£13.6	£6.5	£1.8	£2.9	£0.7	£0.0	£41.9	£35.4
Tesco Extra, Easton Lane, Winchester	£15.0	£8.4	£1.3	£3.6	£6.7	£9.1	£1.1	£0.1	£45.0	£41.4
Other	£0.1	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.3	£0.3
Sub-Total	£29.8	£10.5	£14.9	£10.1	£8.5	£12.1	£1.8	£0.1	£87.2	£77.2
WINCHESTER DISTRICT	**£88.6**	**£29.1**	**£22.9**	**£13.5**	**£18.3**	**£24.8**	**£25.6**	**£17.0**	**£239.0**	**£225.5**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	£1.1	£0.0	£1.0	£11.1	£0.0	£0.2	£0.1	£0.0	£13.3	£2.3
Asda, Bournemouth Road, Chandler's Ford	£2.0	£0.5	£1.5	£23.0	£0.1	£0.5	£0.5	£0.9	£28.9	£5.9
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	£0.5	£0.0	£2.7	£13.5	£0.3	£0.6	£0.1	£0.6	£18.1	£4.6
Other	£0.8	£0.0	£0.2	£8.2	£0.0	£0.0	£0.0	£0.4	£9.5	£1.3
Sub-Total	£4.4	£0.5	£5.3	£55.7	£0.4	£1.3	£0.6	£1.9	£69.7	£14.0
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	£0.0	£0.1	£0.7	£8.5	£0.0	£0.7	£0.6	£0.0	£10.6	£2.2
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	£0.0	£0.0	£0.2	£1.9	£0.0	£0.0	£0.1	£0.0	£2.2	£0.4
Sainsbury's Superstore, Leigh Road, Eastleigh	£0.0	£0.0	£0.4	£10.1	£0.0	£0.1	£0.3	£0.0	£10.8	£0.7
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	£0.0	£0.0	£0.8	£11.4	£0.0	£0.2	£0.0	£0.0	£12.3	£0.9
Other Eastleigh Town Centre	£0.0	£0.0	£0.1	£1.2	£0.0	£0.0	£0.0	£0.0	£1.3	£0.1
Sub-Total	£0.0	£0.1	£2.2	£33.0	£0.0	£1.0	£1.0	£0.0	£37.3	£4.2
Fareham Town Centre										
Aldi, West Street, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£13.7	£15.7	£15.7
Asda, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£3.7	£4.6	£4.6
Lidl, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.8
Tesco Superstore, Quay Street, Fareham	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.3	£5.4	£7.0	£6.9
Other Fareham Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£1.1	£1.4	£1.4
Sainsbury's Superstore, Wallington Way,Fareham	£0.0	£0.0	£0.0	£1.2	£0.0	£0.4	£4.7	£26.7	£33.8	£32.6
Sub-Total	£0.0	£0.0	£0.0	£1.3	£0.0	£0.5	£8.8	£51.4	£63.4	£62.0
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	£0.2	£0.0	£0.8	£15.3	£0.0	£1.4	£8.1	£5.2	£31.0	£15.7
Other Hedge End	£0.1	£0.0	£0.2	£2.1	£0.0	£0.4	£0.8	£2.2	£5.9	£3.7
Sub-Total	£0.3	£0.0	£1.1	£17.4	£0.0	£1.7	£9.0	£7.4	£36.8	£19.4
Alton	£0.0	£0.0	£0.0	£0.0	£2.5	£0.9	£0.0	£0.0	£3.3	£3.3
Andover	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£1.2
Basingstoke	£0.0	£0.3	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£1.4	£1.4
Southampton	£0.2	£0.0	£0.0	£5.5	£0.0	£1.0	£0.1	£1.1	£7.8	£2.4
Portsmouth	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£1.5	£0.6	£3.2	£2.1
Romsey	£0.1	£0.0	£0.2	£0.7	£0.0	£0.5	£0.0	£0.0	£1.4	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£11.1	£2.1	£13.3	£13.3
Other	£0.1	£0.4	£0.7	£27.6	£0.5	£7.8	£2.8	£12.7	£52.8	£25.2
OUTSIDE OF WINCHESTER DISTRICT	**£5.1**	**£2.5**	**£9.5**	**£142.3**	**£3.5**	**£16.0**	**£35.0**	**£77.1**	**£291.8**	**£149.5**
TOTAL MARKET SHARE	£93.7	£31.6	£32.4	£155.8	£21.7	£40.8	£60.6	£94.2	£530.8	£375.0

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 3: 2024 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6				
TOTAL AVAILABLE SPEND (excluding SFT):	£102.79	£34.67	£35.61	£163.46	£23.87	£40.29	£66.50	£99.12	£566.30	£402.84
WinchesterTown										
Co op, City Road, Winchester	£1.1	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£1.5	£1.3
Iceland, Middle Brook Street, Winchester	£4.1	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£4.8	£4.8
Marks & Spencer Foodhall, High Street, Winchester	£4.7	£0.2	£0.8	£0.7	£0.4	£0.0	£0.1	£0.1	£7.0	£6.3
M&S Simply Food, Winchester Rail Station, Winchester	£0.4	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.7	£0.7
Sainsbury's Superstore, Middlebrook Street, Winchester	£12.6	£1.1	£0.2	£0.0	£0.0	£1.4	£0.0	£0.0	£15.3	£15.3
Tesco Express, High Street, Winchester	£3.4	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£4.3	£4.3
Other	£1.5	£0.2	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£2.1	£2.1
Sub-Total	£27.8	£1.8	£1.3	£0.9	£0.5	£3.2	£0.1	£0.1	£35.7	£34.8
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.6	£0.8	£0.8
Lidl, Rookery Avenue, Solent Way, Whiteley	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£1.3	£2.8	£5.5	£4.0
Tesco Superstore, Whiteley Way, Whiteley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£7.2	£7.7	£7.7
Sub-Total	£0.0	£0.0	£0.0	£1.5	£0.0	£0.1	£1.8	£10.6	£14.0	£12.5
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	£0.3	£0.2	£0.0	£0.3	£0.0	£0.9	£6.8	£0.7	£9.3	£8.9
Co-op, High Street, Bishop's Waltham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£8.4	£0.4	£9.4	£9.4
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.3	£0.0	£2.4	£2.4
Sub-Total	£0.3	£0.2	£0.0	£0.3	£0.0	£1.6	£17.4	£1.1	£21.1	£20.8
New Alresford District Centre										
Co-op, West Street, Alresford	£0.3	£0.0	£0.0	£0.0	£4.2	£1.4	£0.0	£0.0	£5.9	£5.9
Tesco Express, Broad Street, Alresford	£0.2	£0.0	£0.0	£0.0	£3.8	£1.5	£0.0	£0.0	£5.5	£5.5
Other	£0.0	£0.0	£0.0	£0.0	£0.9	£0.1	£0.0	£0.0	£1.0	£1.0
Sub-Total	£0.5	£0.0	£0.0	£0.0	£8.9	£3.1	£0.0	£0.0	£12.5	£12.5
Wickham District Centre										
Co-op, The Square, Wickham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.0	£4.1	£5.3	£5.3
Other	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£1.1	£1.5	£1.3
Sub-Total	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1	£1.2	£5.2	£6.7	£6.6
Weeke Local Centre										
Aldi, Burnett Close, Winchester	£16.0	£7.7	£0.8	£0.0	£0.8	£1.6	£0.1	£0.0	£27.0	£27.0
Waitrose, Stockbridge Road, Winchester	£13.2	£5.0	£1.5	£0.0	£0.3	£0.0	£0.9	£0.0	£20.9	£20.9
Other	£0.9	£0.6	£0.0	£0.2	£0.1	£0.0	£0.4	£0.0	£2.1	£1.9
Sub-Total	£30.1	£13.3	£2.3	£0.2	£1.2	£1.6	£1.3	£0.0	£50.0	£49.8
Smaller Centres										
Badger Farm Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Denmead Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£2.5	£2.5
Kings Worthy Local Centre	£0.1	£3.6	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£3.8	£3.8
Stockbridge Road/Andover Road Local Centre	£2.4	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£2.7
Village centres/ neighbourhood stores	£3.4	£1.3	£4.9	£0.5	£0.0	£2.9	£1.9	£0.7	£15.7	£15.2
Sub-Total	£5.9	£5.1	£5.2	£0.5	£0.1	£2.9	£4.3	£0.7	£24.7	£24.2
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	£16.2	£2.1	£14.9	£6.8	£2.0	£2.9	£0.7	£0.0	£45.6	£38.8
Tesco Extra, Easton Lane, Winchester	£16.4	£9.2	£1.4	£3.7	£7.3	£9.0	£1.2	£0.1	£48.4	£44.7
Other	£0.1	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.4
Sub-Total	£32.7	£11.5	£16.3	£10.6	£9.3	£12.0	£1.9	£0.1	£94.4	£83.8
WINCHESTER DISTRICT	**£97.2**	**£31.9**	**£25.2**	**£14.2**	**£20.0**	**£24.5**	**£28.1**	**£17.9**	**£259.1**	**£244.9**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	£1.2	£0.0	£1.1	£11.6	£0.0	£0.2	£0.1	£0.0	£14.2	£2.6
Asda, Bournemouth Road, Chandler's Ford	£2.2	£0.5	£1.7	£24.1	£0.1	£0.5	£0.5	£1.0	£30.7	£6.6
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	£0.5	£0.0	£2.9	£14.1	£0.4	£0.6	£0.1	£0.6	£19.2	£5.1
Other	£0.9	£0.0	£0.2	£8.6	£0.0	£0.0	£0.0	£0.4	£10.0	£1.5
Sub-Total	£4.9	£0.5	£5.9	£58.4	£0.5	£1.3	£0.7	£2.0	£74.0	£15.6
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	£0.0	£0.1	£0.8	£8.9	£0.0	£0.7	£0.7	£0.0	£11.3	£2.4
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	£0.0	£0.0	£0.3	£1.9	£0.0	£0.0	£0.2	£0.0	£2.4	£0.4
Sainsbury's Superstore, Leigh Road, Eastleigh	£0.0	£0.0	£0.4	£10.6	£0.0	£0.1	£0.3	£0.0	£11.5	£0.9
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	£0.0	£0.0	£0.9	£11.9	£0.0	£0.2	£0.0	£0.0	£13.0	£1.1
Other Eastleigh Town Centre	£0.0	£0.0	£0.1	£1.3	£0.0	£0.0	£0.0	£0.0	£1.4	£0.1
Sub-Total	£0.0	£0.1	£2.5	£34.7	£0.0	£1.0	£1.1	£0.0	£39.5	£4.8
Fareham Town Centre										
Aldi, West Street, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£14.4	£16.2	£16.2
Asda, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£3.9	£4.8	£4.8
Lidl, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.8	£0.8
Tesco Superstore, Quay Street, Fareham	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.5	£5.7	£7.3	£7.2
Other Fareham Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.2	£1.5	£1.5
Sainsbury's Superstore, Wallington Way,Fareham	£0.0	£0.0	£0.0	£1.3	£0.0	£0.4	£5.2	£28.1	£35.0	£33.7
Sub-Total	£0.0	£0.0	£0.0	£1.4	£0.0	£0.5	£9.6	£54.1	£65.6	£64.2
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	£0.2	£0.0	£0.9	£16.0	£0.0	£1.3	£8.9	£5.5	£32.9	£16.9
Other Hedge End	£0.1	£0.0	£0.3	£2.2	£0.0	£0.4	£0.9	£2.3	£6.2	£3.9
Sub-Total	£0.3	£0.0	£1.2	£18.2	£0.0	£1.7	£9.9	£7.8	£39.0	£20.8
Alton	£0.0	£0.0	£0.0	£0.0	£2.7	£0.9	£0.0	£0.0	£3.6	£3.6
Andover	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3
Basingstoke	£0.0	£0.3	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£1.4	£1.4
Southampton	£0.2	£0.0	£0.0	£5.8	£0.0	£1.0	£0.1	£1.2	£8.2	£2.4
Portsmouth	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£1.6	£0.7	£3.4	£2.3
Romsey	£0.1	£0.0	£0.2	£0.7	£0.0	£0.5	£0.0	£0.0	£1.5	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£12.2	£2.2	£14.5	£14.5
Other	£0.1	£0.5	£0.8	£29.0	£0.6	£7.7	£3.1	£13.4	£55.1	£26.1
OUTSIDE OF WINCHESTER DISTRICT	**£5.6**	**£2.7**	**£10.5**	**£149.3**	**£3.8**	**£15.8**	**£38.4**	**£81.2**	**£307.2**	**£157.9**
TOTAL MARKET SHARE	£102.8	£34.7	£35.6	£163.5	£23.9	£40.3	£66.5	£99.1	£566.3	£402.8

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 4: 2029 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6				
TOTAL AVAILABLE SPEND (excluding SFT):	£109.7	£37.0	£38.0	£170.3	£25.5	£39.7	£71.0	£103.3	£594.4	£424.10
WinchesterTown										
Co op, City Road, Winchester	£1.1	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£1.5	£1.3
Iceland, Middle Brook Street, Winchester	£4.4	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£5.1	£5.1
Marks & Spencer Foodhall, High Street, Winchester	£5.0	£0.2	£0.8	£0.7	£0.4	£0.0	£0.1	£0.1	£7.4	£6.7
M&S Simply Food, Winchester Rail Station, Winchester	£0.4	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.7	£0.7
Sainsbury's Superstore, Middlebrook Street, Winchester	£13.4	£1.2	£0.2	£0.0	£0.0	£1.4	£0.0	£0.0	£16.2	£16.2
Tesco Express, High Street, Winchester	£3.6	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£4.6	£4.6
Other	£1.6	£0.3	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£2.2	£2.2
Sub-Total	£29.6	£1.9	£1.4	£0.9	£0.5	£3.1	£0.1	£0.1	£37.8	£36.9
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.8	£0.8
Lidl, Rookery Avenue, Solent Way, Whiteley	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£1.4	£2.9	£5.8	£4.2
Tesco Superstore, Whiteley Way, Whiteley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£7.6	£8.0	£8.0
Sub-Total	£0.0	£0.0	£0.0	£1.6	£0.0	£0.1	£1.9	£11.1	£14.7	£13.1
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	£0.4	£0.2	£0.0	£0.4	£0.0	£0.9	£7.3	£0.7	£9.8	£9.4
Co-op, High Street, Bishop's Waltham	£0.0	£0.1	£0.0	£0.0	£0.0	£0.5	£8.9	£0.5	£10.0	£10.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.4	£0.0	£2.6	£2.6
Sub-Total	£0.4	£0.3	£0.0	£0.4	£0.0	£1.6	£18.6	£1.2	£22.3	£22.0
New Alresford District Centre										
Co-op, West Street, Alresford	£0.3	£0.0	£0.0	£0.0	£4.5	£1.4	£0.0	£0.0	£6.2	£6.2
Tesco Express, Broad Street, Alresford	£0.2	£0.0	£0.0	£0.0	£4.0	£1.5	£0.0	£0.0	£5.7	£5.7
Other	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£0.0	£0.0	£1.1	£1.1
Sub-Total	£0.5	£0.0	£0.0	£0.0	£9.5	£3.0	£0.0	£0.0	£13.0	£13.0
Wickham District Centre										
Co-op, The Square, Wickham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.1	£4.3	£5.5	£5.5
Other	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£1.2	£1.6	£1.4
Sub-Total	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1	£1.3	£5.5	£7.1	£6.9
Weeke Local Centre										
Aldi, Burnett Close, Winchester	£17.1	£8.2	£0.9	£0.0	£0.9	£1.5	£0.1	£0.0	£28.7	£28.7
Waitrose, Stockbridge Road, Winchester	£14.1	£5.4	£1.6	£0.0	£0.3	£0.0	£1.0	£0.0	£22.3	£22.3
Other	£0.9	£0.6	£0.0	£0.2	£0.1	£0.0	£0.4	£0.0	£2.2	£2.0
Sub-Total	£32.1	£14.2	£2.5	£0.2	£1.3	£1.5	£1.4	£0.0	£53.2	£53.0
Smaller Centres										
Badger Farm Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Denmead Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£2.6	£2.6
Kings Worthy Local Centre	£0.1	£3.9	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.1	£4.1
Stockbridge Road/Andover Road Local Centre	£2.5	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£2.8
Village centres/ neighbourhood stores	£3.7	£1.4	£5.3	£0.5	£0.0	£2.8	£2.0	£0.7	£16.5	£16.0
Sub-Total	£6.3	£5.4	£5.6	£0.5	£0.1	£2.8	£4.6	£0.7	£26.1	£25.6
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	£17.2	£2.3	£15.9	£7.1	£2.1	£2.8	£0.8	£0.0	£48.3	£41.2
Tesco Extra, Easton Lane, Winchester	£17.5	£9.8	£1.5	£3.9	£7.8	£8.9	£1.3	£0.1	£50.8	£46.9
Other	£0.1	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.4
Sub-Total	£34.9	£12.3	£17.4	£11.0	£9.9	£11.8	£2.1	£0.1	£99.5	£88.5
WINCHESTER DISTRICT	**£103.8**	**£34.1**	**£26.8**	**£14.8**	**£21.4**	**£24.2**	**£30.0**	**£18.7**	**£273.7**	**£258.9**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	£1.3	£0.0	£1.1	£12.1	£0.0	£0.2	£0.1	£0.0	£14.8	£2.7
Asda, Bournemouth Road, Chandler's Ford	£2.4	£0.6	£1.8	£25.1	£0.1	£0.5	£0.5	£1.0	£32.0	£6.9
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	£0.5	£0.0	£3.1	£14.7	£0.4	£0.5	£0.1	£0.6	£20.1	£5.3
Other	£1.0	£0.0	£0.2	£8.9	£0.0	£0.0	£0.0	£0.4	£10.5	£1.5
Sub-Total	£5.2	£0.6	£6.3	£60.8	£0.5	£1.2	£0.7	£2.0	£77.4	£16.5
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	£0.0	£0.1	£0.9	£9.3	£0.0	£0.7	£0.7	£0.0	£11.7	£2.5
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	£0.0	£0.0	£0.3	£2.0	£0.0	£0.0	£0.2	£0.0	£2.5	£0.4
Sainsbury's Superstore, Leigh Road, Eastleigh	£0.0	£0.0	£0.5	£11.0	£0.0	£0.1	£0.3	£0.0	£12.0	£0.9
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	£0.0	£0.0	£0.9	£12.4	£0.0	£0.2	£0.0	£0.0	£13.5	£1.1
Other Eastleigh Town Centre	£0.0	£0.0	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0	£1.5	£0.1
Sub-Total	£0.0	£0.1	£2.6	£36.1	£0.0	£1.0	£1.2	£0.0	£41.1	£5.0
Fareham Town Centre										
Aldi, West Street, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£15.0	£16.9	£16.9
Asda, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£4.1	£5.0	£5.0
Lidl, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.9
Tesco Superstore, Quay Street, Fareham	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.6	£6.0	£7.6	£7.5
Other Fareham Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.2	£1.6	£1.6
Sainsbury's Superstore, Wallington Way,Fareham	£0.0	£0.0	£0.0	£1.4	£0.0	£0.4	£5.5	£29.3	£36.6	£35.2
Sub-Total	£0.0	£0.0	£0.0	£1.5	£0.0	£0.5	£10.3	£56.4	£68.6	£67.1
Hedge End										£0.0
Sainsbury's Superstore, Tollbar way, Hedge End	£0.2	£0.0	£0.9	£16.7	£0.0	£1.3	£9.5	£5.7	£34.4	£17.8
Other Hedge End	£0.1	£0.0	£0.3	£2.3	£0.0	£0.4	£1.0	£2.4	£6.4	£4.1
Sub-Total	£0.3	£0.0	£1.2	£19.0	£0.0	£1.7	£10.5	£8.1	£40.9	£21.9
Alton	£0.0	£0.0	£0.0	£0.0	£2.9	£0.8	£0.0	£0.0	£3.7	£3.7
Andover	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£1.4
Basingstoke	£0.0	£0.3	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£1.4	£1.4
Southampton	£0.2	£0.0	£0.0	£6.0	£0.0	£0.9	£0.1	£1.2	£8.5	£2.5
Portsmouth	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£1.8	£0.7	£3.6	£2.4
Romsey	£0.1	£0.0	£0.2	£0.7	£0.0	£0.5	£0.0	£0.0	£1.6	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£13.0	£2.3	£15.4	£15.4
Other	£0.1	£0.5	£0.8	£30.2	£0.6	£7.6	£3.3	£13.9	£57.1	£26.9
OUTSIDE OF WINCHESTER DISTRICT	**£5.9**	**£2.9**	**£11.2**	**£155.5**	**£4.1**	**£15.5**	**£40.9**	**£84.6**	**£320.7**	**£165.2**
TOTAL MARKET SHARE	£109.7	£37.0	£38.0	£170.3	£25.5	£39.7	£71.0	£103.3	£594.4	£424.1

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 5: 2034 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Excluding Eastleigh (Zone 4)
TOTAL AVAILABLE SPEND (excluding SFT):	£111.8	£37.7	£38.7	£176.6	£26.0	£39.2	£72.3	£106.0	£608.4	£431.76
WinchesterTown										
Co op, City Road, Winchester	£1.1	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£1.6	£1.3
Iceland, Middle Brook Street, Winchester	£4.5	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£5.2	£5.2
Marks & Spencer Foodhall, High Street, Winchester	£5.1	£0.2	£0.9	£0.7	£0.4	£0.0	£0.1	£0.1	£7.6	£6.8
M&S Simply Food, Winchester Rail Station, Winchester	£0.4	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.7	£0.7
Sainsbury's Superstore, Middlebrook Street, Winchester	£13.7	£1.2	£0.2	£0.0	£0.0	£1.4	£0.0	£0.0	£16.5	£16.5
Tesco Express, High Street, Winchester	£3.7	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£4.6	£4.6
Other	£1.6	£0.3	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£2.3	£2.3
Sub-Total	£30.2	£2.0	£1.4	£1.0	£0.5	£3.1	£0.1	£0.1	£38.4	£37.5
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.9	£0.9
Lidl, Rookery Avenue, Solent Way, Whiteley	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£1.4	£2.9	£6.0	£4.3
Tesco Superstore, Whiteley Way, Whiteley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£7.7	£8.2	£8.2
Sub-Total	£0.0	£0.0	£0.0	£1.6	£0.0	£0.1	£1.9	£11.4	£15.1	£13.4
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	£0.4	£0.2	£0.0	£0.4	£0.0	£0.9	£7.4	£0.7	£10.0	£9.6
Co-op, High Street, Bishop's Waltham	£0.0	£0.1	£0.0	£0.0	£0.0	£0.5	£9.1	£0.5	£10.1	£10.1
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.5	£0.0	£2.6	£2.6
Sub-Total	£0.4	£0.3	£0.0	£0.4	£0.0	£1.6	£19.0	£1.2	£22.7	£22.4
New Alresford District Centre										
Co-op, West Street, Alresford	£0.3	£0.0	£0.0	£0.0	£4.6	£1.4	£0.0	£0.0	£6.3	£6.3
Tesco Express, Broad Street, Alresford	£0.2	£0.0	£0.0	£0.0	£4.1	£1.5	£0.0	£0.0	£5.8	£5.8
Other	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£0.0	£0.0	£1.1	£1.1
Sub-Total	£0.5	£0.0	£0.0	£0.0	£9.7	£3.0	£0.0	£0.0	£13.2	£13.2
Wickham District Centre										
Co-op, The Square, Wickham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.1	£4.4	£5.6	£5.6
Other	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£1.2	£1.6	£1.4
Sub-Total	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1	£1.3	£5.6	£7.2	£7.0
Weeke Local Centre										
Aldi, Burnett Close, Winchester	£17.4	£8.3	£0.9	£0.0	£0.9	£1.5	£0.1	£0.0	£29.2	£29.2
Waitrose, Stockbridge Road, Winchester	£14.3	£5.5	£1.6	£0.0	£0.3	£0.0	£1.0	£0.0	£22.7	£22.7
Other	£1.0	£0.6	£0.0	£0.2	£0.1	£0.0	£0.4	£0.0	£2.3	£2.0
Sub-Total	£32.7	£14.5	£2.5	£0.2	£1.3	£1.5	£1.5	£0.0	£54.2	£54.0
Smaller Centres										
Badger Farm Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Denmead Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£2.7	£2.7
Kings Worthy Local Centre	£0.1	£3.9	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.1	£4.1
Stockbridge Road/Andover Road Local Centre	£2.6	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
Village centres/ neighbourhood stores	£3.7	£1.5	£5.4	£0.5	£0.0	£2.8	£2.0	£0.8	£16.7	£16.2
Sub-Total	£6.4	£5.5	£5.7	£0.5	£0.2	£2.8	£4.7	£0.8	£26.6	£26.0
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	£17.6	£2.3	£16.2	£7.4	£2.2	£2.8	£0.8	£0.0	£49.3	£41.9
Tesco Extra, Easton Lane, Winchester	£17.9	£10.0	£1.5	£4.0	£7.9	£8.8	£1.3	£0.1	£51.6	£47.5
Other	£0.1	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.4
Sub-Total	£35.6	£12.5	£17.7	£11.4	£10.1	£11.7	£2.1	£0.1	£101.2	£89.8
WINCHESTER DISTRICT	**£105.8**	**£34.7**	**£27.4**	**£15.3**	**£21.8**	**£23.9**	**£30.6**	**£19.2**	**£278.6**	**£263.3**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	£1.3	£0.0	£1.1	£12.5	£0.0	£0.2	£0.1	£0.0	£15.3	£2.8
Asda, Bournemouth Road, Chandler's Ford	£2.4	£0.6	£1.8	£26.0	£0.1	£0.5	£0.5	£1.0	£33.1	£7.1
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	£0.6	£0.0	£3.2	£15.3	£0.4	£0.5	£0.1	£0.6	£20.7	£5.4
Other	£1.0	£0.0	£0.2	£9.3	£0.0	£0.0	£0.0	£0.4	£10.8	£1.6
Sub-Total	£5.3	£0.6	£6.4	£63.1	£0.5	£1.2	£0.7	£2.1	£79.9	£16.8
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	£0.0	£0.1	£0.9	£9.6	£0.0	£0.7	£0.8	£0.0	£12.1	£2.5
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	£0.0	£0.0	£0.3	£2.1	£0.0	£0.0	£0.2	£0.0	£2.5	£0.4
Sainsbury's Superstore, Leigh Road, Eastleigh	£0.0	£0.0	£0.5	£11.4	£0.0	£0.1	£0.3	£0.0	£12.4	£0.9
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	£0.0	£0.0	£1.0	£12.9	£0.0	£0.2	£0.0	£0.0	£14.0	£1.1
Other Eastleigh Town Centre	£0.0	£0.0	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0	£1.5	£0.1
Sub-Total	£0.0	£0.1	£2.7	£37.5	£0.0	£1.0	£1.3	£0.0	£42.6	£5.1
Fareham Town Centre										
Aldi, West Street, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£15.4	£17.4	£17.4
Asda, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£4.2	£5.1	£5.1
Lidl, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.9
Tesco Superstore, Quay Street, Fareham	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.6	£6.1	£7.8	£7.7
Other Fareham Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.3	£1.6	£1.6
Sainsbury's Superstore, Wallington Way,Fareham	£0.0	£0.0	£0.0	£1.4	£0.0	£0.4	£5.6	£30.1	£37.5	£36.1
Sub-Total	£0.0	£0.0	£0.0	£1.5	£0.0	£0.5	£10.5	£57.9	£70.3	£68.8
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	£0.2	£0.0	£1.0	£17.3	£0.0	£1.3	£9.7	£5.9	£35.4	£18.1
Other Hedge End	£0.1	£0.0	£0.3	£2.4	£0.0	£0.4	£1.0	£2.4	£6.6	£4.2
Sub-Total	£0.3	£0.0	£1.3	£19.7	£0.0	£1.7	£10.7	£8.3	£42.0	£22.3
Alton	£0.0	£0.0	£0.0	£0.0	£2.9	£0.8	£0.0	£0.0	£3.8	£3.8
Andover	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£1.4
Basingstoke	£0.0	£0.3	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£1.4	£1.4
Southampton	£0.2	£0.0	£0.0	£6.2	£0.0	£0.9	£0.1	£1.2	£8.8	£2.5
Portsmouth	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£1.8	£0.7	£3.7	£2.5
Romsey	£0.1	£0.0	£0.2	£0.7	£0.0	£0.5	£0.0	£0.0	£1.6	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£13.3	£2.3	£15.7	£15.7
Other	£0.1	£0.5	£0.9	£31.3	£0.6	£7.5	£3.4	£14.3	£58.6	£27.2
OUTSIDE OF WINCHESTER DISTRICT	**£6.0**	**£3.0**	**£11.4**	**£161.3**	**£4.2**	**£15.4**	**£41.7**	**£86.9**	**£329.8**	**£168.5**
TOTAL MARKET SHARE	£111.8	£37.7	£38.7	£176.6	£26.0	£39.2	£72.3	£106.0	£608.4	£431.8

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 6: 2036 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
TOTAL AVAILABLE SPEND (excluding SFT):	£112.0	£37.8	£38.8	£178.9	£26.0	£39.0	£72.4	£106.9	£611.8	£432.87
WinchesterTown										
Co op, City Road, Winchester	£1.1	£0.0	£0.0	£0.2	£0.0	£0.2	£0.0	£0.0	£1.6	£1.4
Iceland, Middle Brook Street, Winchester	£4.5	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£5.2	£5.2
Marks & Spencer Foodhall, High Street, Winchester	£5.1	£0.2	£0.9	£0.7	£0.4	£0.0	£0.1	£0.1	£7.6	£6.8
M&S Simply Food, Winchester Rail Station, Winchester	£0.4	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.7	£0.7
Sainsbury's Superstore, Middlebrook Street, Winchester	£13.7	£1.2	£0.2	£0.0	£0.0	£1.3	£0.0	£0.0	£16.5	£16.5
Tesco Express, High Street, Winchester	£3.7	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£4.6	£4.6
Other	£1.6	£0.3	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£2.3	£2.3
Sub-Total	£30.2	£2.0	£1.4	£1.0	£0.5	£3.1	£0.1	£0.1	£38.5	£37.5
Whiteley Town Centre										
Marks & Spencer, Whiteley Way, Whiteley, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£0.9	£0.9
Lidl, Rookery Avenue, Solent Way, Whiteley	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£1.4	£3.0	£6.0	£4.4
Tesco Superstore, Whiteley Way, Whiteley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£7.8	£8.3	£8.3
Sub-Total	£0.0	£0.0	£0.0	£1.7	£0.0	£0.1	£1.9	£11.5	£15.2	£13.5
Bishop's Waltham District Centre										
Budgens, Winchester Road, Bishop's Waltham	£0.4	£0.2	£0.0	£0.4	£0.0	£0.9	£7.4	£0.7	£10.0	£9.6
Co-op, High Street, Bishop's Waltham	£0.0	£0.1	£0.0	£0.0	£0.0	£0.5	£9.1	£0.5	£10.2	£10.2
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£2.5	£0.0	£2.6	£2.6
Sub-Total	£0.4	£0.3	£0.0	£0.4	£0.0	£1.6	£19.0	£1.2	£22.8	£22.4
New Alresford District Centre										
Co-op, West Street, Alresford	£0.3	£0.0	£0.0	£0.0	£4.6	£1.4	£0.0	£0.0	£6.3	£6.3
Tesco Express, Broad Street, Alresford	£0.2	£0.0	£0.0	£0.0	£4.1	£1.4	£0.0	£0.0	£5.8	£5.8
Other	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£0.0	£0.0	£1.1	£1.1
Sub-Total	£0.5	£0.0	£0.0	£0.0	£9.7	£3.0	£0.0	£0.0	£13.2	£13.2
Wickham District Centre										
Co-op, The Square, Wickham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.1	£4.5	£5.7	£5.7
Other	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2	£1.2	£1.6	£1.4
Sub-Total	£0.0	£0.0	£0.0	£0.2	£0.0	£0.1	£1.3	£5.6	£7.3	£7.1
Weeke Local Centre										
Aldi, Burnett Close, Winchester	£17.5	£8.4	£0.9	£0.0	£0.9	£1.5	£0.1	£0.0	£29.2	£29.2
Waitrose, Stockbridge Road, Winchester	£14.3	£5.5	£1.6	£0.0	£0.3	£0.0	£1.0	£0.0	£22.8	£22.8
Other	£1.0	£0.6	£0.0	£0.2	£0.1	£0.0	£0.4	£0.0	£2.3	£2.0
Sub-Total	£32.8	£14.5	£2.5	£0.2	£1.3	£1.5	£1.5	£0.0	£54.3	£54.1
Smaller Centres										
Badger Farm Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
Denmead Local Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£2.7	£2.7
Kings Worthy Local Centre	£0.1	£4.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£4.1	£4.1
Stockbridge Road/Andover Road Local Centre	£2.6	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
Village centres/ neighbourhood stores	£3.7	£1.5	£5.4	£0.5	£0.0	£2.8	£2.0	£0.8	£16.7	£16.2
Sub-Total	£6.4	£5.5	£5.7	£0.5	£0.2	£2.8	£4.7	£0.8	£26.6	£26.1
Out of Centre										
Sainsbury's Superstore, Badger Farm Road, Winchester	£17.6	£2.3	£16.3	£7.5	£2.2	£2.8	£0.8	£0.0	£49.4	£41.9
Tesco Extra, Easton Lane, Winchester	£17.9	£10.0	£1.5	£4.1	£8.0	£8.8	£1.3	£0.1	£51.6	£47.6
Other	£0.1	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.4
Sub-Total	£35.6	£12.5	£17.8	£11.6	£10.1	£11.6	£2.1	£0.1	£101.4	£89.9
WINCHESTER DISTRICT	**£105.9**	**£34.8**	**£27.4**	**£15.5**	**£21.8**	**£23.8**	**£30.6**	**£19.3**	**£279.2**	**£263.7**
Chandlers Ford										
Aldi, Chestnut Avenue Retail Park, Chandler's Ford	£1.3	£0.0	£1.1	£12.7	£0.0	£0.2	£0.1	£0.0	£15.5	£2.8
Asda, Bournemouth Road, Chandler's Ford	£2.4	£0.6	£1.8	£26.4	£0.1	£0.5	£0.5	£1.1	£33.5	£7.1
Waitrose, Oakmount Road, Chandler's Ford, Eastleigh	£0.6	£0.0	£3.2	£15.5	£0.4	£0.5	£0.1	£0.6	£20.9	£5.4
Other	£1.0	£0.0	£0.2	£9.4	£0.0	£0.0	£0.0	£0.4	£11.0	£1.6
Sub-Total	£5.3	£0.6	£6.4	£63.9	£0.5	£1.2	£0.7	£2.1	£80.8	£16.9
Eastleigh Town Centre										
Lidl, Coles Close, off Twyford Road, Eastleigh	£0.0	£0.1	£0.9	£9.7	£0.0	£0.7	£0.8	£0.0	£12.2	£2.5
Marks & Spencer Foodhall, Coles Close, Twyford Road, Eastl	£0.0	£0.0	£0.3	£2.1	£0.0	£0.0	£0.2	£0.0	£2.6	£0.4
Sainsbury's Superstore, Leigh Road, Eastleigh	£0.0	£0.0	£0.5	£11.6	£0.0	£0.1	£0.3	£0.0	£12.5	£0.9
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	£0.0	£0.0	£1.0	£13.1	£0.0	£0.2	£0.0	£0.0	£14.2	£1.1
Other Eastleigh Town Centre	£0.0	£0.0	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0	£1.5	£0.1
Sub-Total	£0.0	£0.1	£2.7	£37.9	£0.0	£1.0	£1.3	£0.0	£43.0	£5.1
Fareham Town Centre										
Aldi, West Street, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£15.5	£17.5	£17.5
Asda, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£4.2	£5.1	£5.1
Lidl, Speedfields Park, Newgate Lane, Fareham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.9	£0.9
Tesco Superstore, Quay Street, Fareham	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.6	£6.2	£7.9	£7.8
Other Fareham Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£1.3	£1.6	£1.6
Sainsbury's Superstore, Wallington Way,Fareham	£0.0	£0.0	£0.0	£1.4	£0.0	£0.4	£5.6	£30.3	£37.8	£36.4
Sub-Total	£0.0	£0.0	£0.0	£1.5	£0.0	£0.5	£10.5	£58.3	£70.8	£69.3
Hedge End										
Sainsbury's Superstore, Tollbar way, Hedge End	£0.2	£0.0	£1.0	£17.5	£0.0	£1.3	£9.7	£5.9	£35.7	£18.2
Other Hedge End	£0.1	£0.0	£0.3	£2.4	£0.0	£0.4	£1.0	£2.4	£6.6	£4.2
Sub-Total	£0.3	£0.0	£1.3	£20.0	£0.0	£1.7	£10.7	£8.4	£42.3	£22.4
Alton	£0.0	£0.0	£0.0	£0.0	£3.0	£0.8	£0.0	£0.0	£3.8	£3.8
Andover	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£1.4
Basingstoke	£0.0	£0.3	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£1.4	£1.4
Southampton	£0.2	£0.0	£0.0	£6.3	£0.0	£0.9	£0.1	£1.3	£8.8	£2.5
Portsmouth	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£1.8	£0.7	£3.8	£2.5
Romsey	£0.1	£0.0	£0.2	£0.7	£0.0	£0.5	£0.0	£0.0	£1.6	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£13.3	£2.4	£15.8	£15.8
Other	£0.1	£0.5	£0.9	£31.7	£0.6	£7.4	£3.4	£14.4	£59.1	£27.3
OUTSIDE OF WINCHESTER DISTRICT	**£6.0**	**£3.0**	**£11.4**	**£163.4**	**£4.2**	**£15.3**	**£41.8**	**£87.6**	**£332.6**	**£169.2**
TOTAL MARKET SHARE	£112.0	£37.8	£38.8	£178.9	£26.0	£39.0	£72.4	£106.9	£611.8	£432.9

Note: Figures are rounded to the nearest decimal point and may not sum.

7. Comparison Goods Turnover (excluding SFT)

Lambert Smith Hampton

TABLE 1 ALL COMPARISON GOODS MARKET SHARE 2019 (%) - ALL COMPARISON GOODS

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Excluding Eastleigh (Zone 4)
Winchester Town Centre	47.4%	33.4%	26.5%	7.2%	28.6%	16.2%	5.6%	0.5%	17.2%	21.3%
Whiteley Town Centre	0.5%	0.0%	0.0%	1.1%	0.4%	0.6%	4.3%	8.8%	2.5%	3.1%
Bishop's Waltham District Centre	0.0%	0.0%	0.0%	0.2%	0.0%	2.7%	12.3%	0.4%	1.7%	2.3%
New Alresford District Centre	0.4%	0.8%	0.0%	0.0%	15.1%	4.6%	0.2%	0.0%	1.2%	1.6%
Wickham District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.6%	1.6%	0.4%	0.5%
Local Centres	0.1%	3.7%	0.8%	0.3%	0.3%	0.2%	1.7%	0.0%	0.6%	0.7%
Smaller centres	2.0%	3.5%	2.7%	0.4%	1.6%	3.2%	0.2%	0.1%	1.2%	1.5%
Sub-Total	50.4%	41.6%	30.0%	9.2%	45.9%	27.8%	24.9%	11.3%	24.8%	31.2%
Out of Centre:										
Andover Road Retail Park	0.8%	1.0%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.3%	0.3%
Easton Lane	7.6%	12.0%	3.6%	1.0%	15.3%	10.7%	0.2%	0.0%	4.1%	5.4%
Other	6.7%	5.7%	11.7%	0.8%	4.7%	3.5%	0.1%	0.0%	3.0%	3.9%
Sub-Total	15.1%	18.7%	15.4%	2.2%	20.4%	14.2%	0.3%	0.0%	7.5%	9.6%
WINCHESTER DISTRICT	**65.5%**	**60.3%**	**45.3%**	**11.4%**	**66.3%**	**41.9%**	**25.2%**	**11.4%**	**32.2%**	**40.8%**
Eastleigh Town Centre	1.5%	3.0%	8.5%	23.3%	0.7%	2.2%	1.2%	0.2%	8.2%	2.0%
Eastleigh Out of Centre	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sub-Total	£0.0	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Basingstoke Town Centre	1.1%	3.4%	0.0%	0.0%	3.8%	5.1%	0.1%	0.0%	1.0%	1.4%
Brighton Hill Retail Park	0.5%	2.4%	0.0%	0.0%	0.2%	1.0%	0.0%	0.0%	0.3%	0.5%
Other Basingtoke Out of Centre	0.1%	0.2%	0.0%	0.6%	0.5%	0.0%	0.0%	0.0%	0.2%	0.1%
Sub-Total	1.7%	6.0%	0.0%	0.6%	4.5%	6.1%	0.1%	0.0%	1.5%	1.9%
Fareham Town Centre	0.0%	0.3%	0.4%	0.2%	0.0%	0.5%	10.4%	31.9%	6.9%	9.7%
Fareham Out of Centre	0.0%	0.0%	0.4%	0.2%	0.0%	0.1%	2.1%	10.8%	2.2%	3.1%
Sub-Total	0.0%	0.3%	0.7%	0.4%	0.0%	0.6%	12.5%	42.7%	9.2%	12.8%
Southampton City Centre	18.8%	13.3%	15.9%	13.5%	15.4%	15.0%	8.7%	10.8%	13.7%	13.8%
Hedge End Retail Park	3.8%	6.6%	12.2%	27.3%	3.5%	11.8%	23.4%	15.1%	16.2%	11.6%
Other Southampton Out of Centre	4.7%	0.9%	3.3%	2.2%	2.1%	3.3%	0.8%	2.5%	2.6%	2.8%
Sub-Total	27.2%	20.8%	31.4%	43.0%	21.1%	30.1%	32.9%	28.4%	32.5%	28.1%
Portsmouth City Centre	0.0%	0.0%	0.0%	0.7%	0.0%	0.2%	3.4%	4.0%	1.3%	1.5%
Out of Centre Portsmouth	0.0%	0.7%	0.0%	0.3%	0.7%	0.6%	0.7%	1.2%	0.5%	0.6%
Sub-Total	0.0%	0.7%	0.0%	0.9%	0.7%	0.8%	4.1%	5.2%	1.8%	2.1%
Alton	0.0%	0.2%	0.0%	0.0%	1.9%	1.1%	0.0%	0.0%	0.2%	0.2%
Andover	0.2%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%
Chandlers Ford	0.5%	0.6%	3.0%	6.7%	1.4%	0.9%	0.1%	0.2%	2.4%	0.7%
Romsey	0.0%	0.0%	0.2%	0.1%	0.7%	0.2%	0.3%	0.0%	0.1%	0.1%
Waterlooville	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	14.5%	2.6%	2.2%	3.0%
All Other	2.0%	3.7%	2.6%	5.5%	2.1%	13.7%	9.0%	9.2%	6.1%	6.4%
OUTSIDE WINCHESTER DISTRICT	**34.5%**	**39.7%**	**54.7%**	**88.6%**	**33.7%**	**58.1%**	**74.8%**	**88.6%**	**67.8%**	**59.2%**
TOTAL MARKET SHARE EXCL SFT	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 2: 2019 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M) - ALL COMPARISON GOODS

Zone:	Central Winchester 1	North Winchester 2	City South 3	Eastleigh 4	New Alresford 5	Upper Meon Valley 6	Bishop's Waltham 7	Whiteley & Fareham 8	Total Study Area	Excluding Eastleigh (Zone 4)
Total Available Expenditure (£m):	£145.4	£54.9	£55.7	£255.4	£36.8	£68.9	£104.3	£154.4	£875.8	£620.4
Winchester Town Centre	£69.0	£18.4	£14.7	£18.4	£10.5	£11.2	£5.8	£0.8	£148.7	£130.3
Whiteley Town Centre	£0.8	£0.0	£0.0	£2.9	£0.1	£0.4	£4.5	£13.5	£22.2	£19.3
Bishop's Waltham District Centre	£0.0	£0.0	£0.0	£0.6	£0.0	£1.9	£12.9	£0.6	£15.9	£15.4
New Alresford District Centre	£0.6	£0.5	£0.0	£0.0	£5.6	£3.2	£0.2	£0.0	£10.0	£10.0
Wickham District Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.7	£2.5	£3.3	£3.3
Local Centres	£0.1	£2.1	£0.5	£0.7	£0.1	£0.1	£1.7	£0.0	£5.2	£4.6
Smaller centres	£2.9	£1.9	£1.5	£0.9	£0.6	£2.2	£0.2	£0.1	£10.3	£9.4
Sub-Total	£73.2	£22.8	£16.7	£23.5	£16.9	£19.1	£26.0	£17.5	£215.7	£192.3
Out of Centre:										
Andover Road Retail Park	£1.2	£0.5	£0.0	£1.0	£0.1	£0.0	£0.0	£0.0	£2.9	£1.8
Easton Lane	£11.0	£6.6	£2.0	£2.6	£5.6	£7.4	£0.2	£0.1	£35.5	£32.9
Other	£9.8	£3.1	£6.5	£2.0	£1.7	£2.4	£0.1	£0.0	£25.7	£23.7
Sub-Total	£22.0	£10.3	£8.6	£5.6	£7.5	£9.8	£0.3	£0.1	£64.1	£58.5
WINCHESTER DISTRICT	**£95.2**	**£33.1**	**£25.3**	**£29.1**	**£24.4**	**£28.9**	**£26.3**	**£17.5**	**£279.8**	**£250.8**
Eastleigh Town Centre	£2.2	£1.7	£4.7	£59.5	£0.2	£1.5	£1.3	£0.4	£71.6	£12.0
Eastleigh Out of Centre	£1.8	£0.4	£4.6	£20.6	£0.3	£1.0	£0.0	£0.2	£28.9	£8.3
Sub-Total	£4.1	£2.1	£9.3	£80.1	£0.5	£2.5	£1.3	£0.6	£100.4	£20.3
Basingstoke Town Centre	£1.6	£1.9	£0.0	£0.0	£1.4	£3.5	£0.2	£0.0	£8.6	£8.6
Brighton Hill Retail Park	£0.8	£1.3	£0.0	£0.0	£0.1	£0.7	£0.0	£0.0	£2.8	£2.8
Other Basingtoke Out of Centre	£0.1	£0.1	£0.0	£1.5	£0.2	£0.0	£0.0	£0.0	£1.9	£0.5
Sub-Total	£2.5	£3.3	£0.0	£1.5	£1.7	£4.2	£0.2	£0.0	£13.4	£11.9
Fareham Town Centre	£0.0	£0.1	£0.2	£0.5	£0.0	£0.3	£10.8	£49.2	£61.2	£60.7
Fareham Out of Centre	£0.0	£0.0	£0.2	£0.5	£0.0	£0.1	£2.2	£16.7	£19.7	£19.2
Sub-Total	£0.0	£0.1	£0.4	£1.0	£0.0	£0.4	£13.1	£65.9	£80.9	£79.9
Southampton City Centre	£27.3	£7.3	£8.8	£34.5	£5.7	£10.3	£9.1	£16.6	£119.6	£85.1
Hedge End Retail Park	£5.5	£3.6	£6.8	£69.7	£1.3	£8.1	£24.4	£23.4	£142.7	£73.0
Other Southampton Out of Centre	£6.9	£0.5	£1.8	£5.6	£0.8	£2.3	£0.9	£3.9	£22.6	£17.0
Sub-Total	£39.6	£11.4	£17.5	£109.9	£7.8	£20.7	£34.3	£43.8	£285.0	£175.1
Portsmouth City Centre	£0.0	£0.0	£0.0	£1.7	£0.0	£0.1	£3.5	£6.1	£11.5	£9.8
Out of Centre Portsmouth	£0.0	£0.4	£0.0	£0.7	£0.3	£0.4	£0.8	£1.9	£4.4	£3.7
Sub-Total	£0.0	£0.4	£0.0	£2.4	£0.3	£0.5	£4.3	£8.1	£15.9	£13.5
Alton	£0.0	£0.1	£0.0	£0.0	£0.7	£0.7	£0.0	£0.0	£1.5	£1.5
Andover	£0.3	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4	£2.4
Chandlers Ford	£0.7	£0.3	£1.7	£17.1	£0.5	£0.6	£0.1	£0.3	£21.3	£4.2
Romsey	£0.0	£0.0	£0.1	£0.2	£0.2	£0.1	£0.3	£0.0	£1.0	£0.8
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£15.1	£4.0	£19.8	£19.8
All Other	£2.9	£2.1	£1.4	£14.1	£0.8	£9.4	£9.4	£14.2	£54.4	£40.2
OUTSIDE WINCHESTER DISTRICT	**£50.1**	**£21.8**	**£30.5**	**£226.4**	**£12.4**	**£40.0**	**£78.0**	**£136.8**	**£596.0**	**£369.6**
TOTAL MARKET SHARE EXCL SFT	£145.4	£54.9	£55.7	£255.4	£36.8	£68.9	£104.3	£154.4	£875.8	£620.4

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 3: 2024 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M) - ALL COMPARISON GOODS

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
Total Available Expenditure (£m):	£176.6	£66.8	£67.7	£296.7	£44.7	£75.4	£126.7	£179.9	£1,034.5	£737.8
Winchester Town Centre	£83.8	£22.3	£17.9	£21.4	£12.8	£12.2	£7.1	£0.9	£178.3	£157.0
Whiteley Town Centre	£0.9	£0.0	£0.0	£3.4	£0.2	£0.5	£5.4	£15.7	£26.1	£22.7
Bishop's Waltham District Centre	£0.0	£0.0	£0.0	£0.7	£0.0	£2.1	£15.6	£0.7	£19.1	£18.4
New Alresford District Centre	£0.7	£0.6	£0.0	£0.0	£6.8	£3.5	£0.3	£0.0	£11.7	£11.7
Wickham District Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.8	£2.9	£3.9	£3.9
Local Centres	£0.1	£2.5	£0.6	£0.8	£0.1	£0.1	£2.1	£0.0	£6.3	£5.5
Smaller centres	£3.5	£2.4	£1.8	£1.1	£0.7	£2.4	£0.2	£0.1	£12.2	£11.1
Sub-Total	£89.0	£27.8	£20.3	£27.2	£20.5	£20.9	£31.5	£20.4	£257.7	£230.4
Out of Centre:										
Andover Road Retail Park	£1.4	£0.7	£0.0	£1.2	£0.2	£0.0	£0.0	£0.0	£3.4	£2.2
Easton Lane	£13.4	£8.0	£2.5	£3.0	£6.8	£8.1	£0.2	£0.1	£42.1	£39.1
Other	£11.9	£3.8	£7.9	£2.3	£2.1	£2.6	£0.2	£0.0	£30.8	£28.5
Sub-Total	£26.7	£12.5	£10.4	£6.5	£9.1	£10.7	£0.4	£0.1	£76.4	£69.9
WINCHESTER DISTRICT	**£115.7**	**£40.2**	**£30.7**	**£33.7**	**£29.7**	**£31.6**	**£32.0**	**£20.5**	**£334.1**	**£300.3**
Eastleigh Town Centre	£2.7	£2.0	£5.7	£69.2	£0.3	£1.7	£1.5	£0.4	£83.6	£14.4
Eastleigh Out of Centre	£2.2	£0.5	£5.6	£23.9	£0.3	£1.1	£0.0	£0.2	£33.9	£10.0
Sub-Total	£4.9	£2.6	£11.3	£93.0	£0.6	£2.8	£1.5	£0.7	£117.4	£24.4
Basingstoke Town Centre	£1.9	£2.3	£0.0	£0.0	£1.7	£3.9	£0.2	£0.0	£10.0	£10.0
Brighton Hill Retail Park	£1.0	£1.6	£0.0	£0.0	£0.1	£0.7	£0.0	£0.0	£3.4	£3.4
Other Basingtoke Out of Centre	£0.2	£0.2	£0.0	£1.7	£0.2	£0.0	£0.0	£0.0	£2.3	£0.6
Sub-Total	£3.1	£4.0	£0.0	£1.7	£2.0	£4.6	£0.2	£0.0	£15.6	£13.9
Fareham Town Centre	£0.0	£0.2	£0.2	£0.6	£0.0	£0.3	£13.2	£57.3	£71.9	£71.3
Fareham Out of Centre	£0.0	£0.0	£0.3	£0.6	£0.0	£0.1	£2.7	£19.5	£23.1	£22.5
Sub-Total	£0.0	£0.2	£0.5	£1.2	£0.0	£0.4	£15.9	£76.8	£95.0	£93.8
Southampton City Centre	£33.1	£8.9	£10.7	£40.1	£6.9	£11.3	£11.0	£19.4	£141.4	£101.3
Hedge End Retail Park	£6.7	£4.4	£8.3	£81.0	£1.6	£8.9	£29.6	£27.3	£167.6	£86.6
Other Southampton Out of Centre	£8.3	£0.6	£2.2	£6.6	£1.0	£2.5	£1.0	£4.5	£26.7	£20.2
Sub-Total	£48.1	£13.9	£21.2	£127.6	£9.4	£22.7	£41.7	£51.1	£335.7	£208.1
Portsmouth City Centre	£0.0	£0.0	£0.0	£2.0	£0.0	£0.1	£4.3	£7.1	£13.6	£11.6
Out of Centre Portsmouth	£0.0	£0.5	£0.0	£0.8	£0.3	£0.5	£0.9	£2.2	£5.2	£4.4
Sub-Total	£0.0	£0.5	£0.0	£2.8	£0.3	£0.6	£5.2	£9.4	£18.7	£16.0
Alton	£0.0	£0.1	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£1.7	£1.7
Andover	£0.4	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
Chandlers Ford	£0.8	£0.4	£2.0	£19.9	£0.6	£0.7	£0.2	£0.3	£24.9	£5.0
Romsey	£0.0	£0.0	£0.1	£0.3	£0.3	£0.1	£0.4	£0.0	£1.2	£1.0
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£18.3	£4.6	£23.8	£23.8
All Other	£3.6	£2.5	£1.7	£16.4	£0.9	£10.3	£11.4	£16.6	£63.4	£47.0
OUTSIDE WINCHESTER DISTRICT	**£60.9**	**£26.5**	**£37.0**	**£262.9**	**£15.1**	**£43.8**	**£94.8**	**£159.5**	**£700.4**	**£437.5**
TOTAL MARKET SHARE EXCL SFT	£176.6	£66.8	£67.7	£296.7	£44.7	£75.4	£126.7	£179.9	£1,034.5	£737.8

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 4: 2029 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M) - ALL COMPARISON GOODS

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
Total Available Expenditure (£m):	£210.8	£79.7	£80.8	£345.7	£53.4	£83.1	£151.2	£209.8	£1,214.6	£868.9
Winchester Town Centre	£100.0	£26.7	£21.4	£24.9	£15.3	£13.5	£8.5	£1.0	£211.1	£186.3
Whiteley Town Centre	£1.1	£0.0	£0.0	£3.9	£0.2	£0.5	£6.5	£18.4	£30.6	£26.7
Bishop's Waltham District Centre	£0.0	£0.0	£0.0	£0.8	£0.0	£2.3	£18.7	£0.8	£22.5	£21.8
New Alresford District Centre	£0.8	£0.7	£0.0	£0.0	£8.1	£3.8	£0.3	£0.0	£13.7	£13.7
Wickham District Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.9	£3.4	£4.6	£4.6
Local Centres	£0.1	£3.0	£0.7	£0.9	£0.2	£0.1	£2.5	£0.0	£7.5	£6.6
Smaller centres	£4.2	£2.8	£2.2	£1.3	£0.8	£2.6	£0.3	£0.2	£14.4	£13.1
Sub-Total	£106.2	£33.1	£24.2	£31.7	£24.5	£23.1	£37.7	£23.8	£304.4	£272.6
Out of Centre:										
Andover Road Retail Park	£1.7	£0.8	£0.0	£1.4	£0.2	£0.0	£0.0	£0.0	£4.1	£2.7
Easton Lane	£16.0	£9.6	£2.9	£3.5	£8.2	£8.9	£0.3	£0.1	£49.5	£46.0
Other	£14.2	£4.5	£9.5	£2.7	£2.5	£2.9	£0.2	£0.0	£36.5	£33.8
Sub-Total	£31.9	£14.9	£12.4	£7.6	£10.9	£11.8	£0.5	£0.1	£90.0	£82.4
WINCHESTER DISTRICT	**£138.1**	**£48.0**	**£36.6**	**£39.3**	**£35.4**	**£34.9**	**£38.1**	**£23.8**	**£394.4**	**£355.0**
Eastleigh Town Centre	£3.2	£2.4	£6.8	£80.6	£0.3	£1.9	£1.8	£0.5	£97.6	£17.0
Eastleigh Out of Centre	£2.6	£0.6	£6.7	£27.8	£0.4	£1.2	£0.0	£0.3	£39.6	£11.8
Sub-Total	£5.9	£3.1	£13.5	£108.4	£0.8	£3.0	£1.8	£0.8	£137.3	£28.8
Basingstoke Town Centre	£2.3	£2.7	£0.0	£0.0	£2.0	£4.3	£0.2	£0.0	£11.6	£11.6
Brighton Hill Retail Park	£1.1	£1.9	£0.0	£0.0	£0.1	£0.8	£0.0	£0.0	£3.9	£3.9
Other Basingtoke Out of Centre	£0.2	£0.2	£0.0	£2.0	£0.3	£0.0	£0.0	£0.0	£2.7	£0.7
Sub-Total	£3.7	£4.8	£0.0	£2.0	£2.4	£5.1	£0.2	£0.0	£18.2	£16.2
Fareham Town Centre	£0.0	£0.2	£0.3	£0.7	£0.0	£0.4	£15.7	£66.9	£84.2	£83.5
Fareham Out of Centre	£0.0	£0.0	£0.3	£0.7	£0.0	£0.1	£3.2	£22.7	£27.0	£26.3
Sub-Total	£0.0	£0.2	£0.6	£1.4	£0.0	£0.5	£18.9	£89.6	£111.2	£109.8
Southampton City Centre	£39.5	£10.6	£12.8	£46.8	£8.2	£12.5	£13.2	£22.6	£166.1	£119.3
Hedge End Retail Park	£8.0	£5.2	£9.9	£94.4	£1.9	£9.8	£35.3	£31.8	£196.2	£101.8
Other Southampton Out of Centre	£9.9	£0.7	£2.7	£7.6	£1.1	£2.8	£1.2	£5.2	£31.4	£23.7
Sub-Total	£57.4	£16.5	£25.3	£148.7	£11.2	£25.0	£49.7	£59.6	£393.6	£244.9
Portsmouth City Centre	£0.0	£0.0	£0.0	£2.3	£0.0	£0.1	£5.1	£8.3	£15.9	£13.6
Out of Centre Portsmouth	£0.0	£0.5	£0.0	£0.9	£0.4	£0.5	£1.1	£2.6	£6.1	£5.2
Sub-Total	£0.0	£0.5	£0.0	£3.2	£0.4	£0.6	£6.2	£10.9	£22.0	£18.7
Alton	£0.0	£0.1	£0.0	£0.0	£1.0	£0.9	£0.0	£0.0	£2.0	£2.0
Andover	£0.5	£2.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	£3.4
Chandlers Ford	£1.0	£0.5	£2.4	£23.1	£0.7	£0.7	£0.2	£0.4	£29.1	£5.9
Romsey	£0.0	£0.0	£0.2	£0.3	£0.4	£0.1	£0.5	£0.0	£1.4	£1.1
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£21.9	£5.4	£28.2	£28.2
All Other	£4.3	£3.0	£2.1	£19.1	£1.1	£11.4	£13.6	£19.3	£73.9	£54.7
OUTSIDE WINCHESTER DISTRICT	**£72.7**	**£31.7**	**£44.2**	**£306.4**	**£18.0**	**£48.3**	**£113.1**	**£185.9**	**£820.2**	**£513.9**
TOTAL MARKET SHARE EXCL SFT	£210.8	£79.7	£80.8	£345.7	£53.4	£83.1	£151.2	£209.8	£1,214.6	£868.9

Note: Figures are rounded to the nearest decimal point and may not sum.

Lambert Smith Hampton

TABLE 5: 2034 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M) - ALL COMPARISON GOODS

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Total Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
Total Available Expenditure (£m):	£243.4	£92.0	£93.3	£406.1	£61.6	£93.0	£174.6	£243.8	£1,407.8	£1,001.7
Winchester Town Centre	£115.5	£30.8	£24.7	£29.2	£17.6	£15.1	£9.8	£1.2	£243.8	£214.5
Whiteley Town Centre	£1.3	£0.0	£0.0	£4.6	£0.2	£0.6	£7.5	£21.3	£35.5	£30.9
Bishop's Waltham District Centre	£0.0	£0.0	£0.0	£0.9	£0.0	£2.5	£21.6	£1.0	£26.0	£25.1
New Alresford District Centre	£0.9	£0.8	£0.0	£0.0	£9.3	£4.3	£0.4	£0.0	£15.7	£15.7
Wickham District Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.1	£3.9	£5.3	£5.3
Local Centres	£0.2	£3.4	£0.8	£1.1	£0.2	£0.2	£2.9	£0.0	£8.7	£7.6
Smaller centres	£4.8	£3.3	£2.5	£1.5	£1.0	£3.0	£0.3	£0.2	£16.5	£15.0
Sub-Total	£122.6	£38.2	£28.0	£37.3	£28.3	£25.8	£43.5	£27.6	£351.4	£314.1
Out of Centre:										
Andover Road Retail Park	£2.0	£0.9	£0.0	£1.6	£0.2	£0.0	£0.0	£0.0	£4.7	£3.1
Easton Lane	£18.5	£11.1	£3.4	£4.1	£9.4	£9.9	£0.3	£0.1	£56.9	£52.7
Other	£16.4	£5.2	£10.9	£3.1	£2.9	£3.2	£0.2	£0.0	£42.1	£38.9
Sub-Total	£36.8	£17.2	£14.3	£8.9	£12.6	£13.2	£0.6	£0.1	£103.6	£94.7
WINCHESTER DISTRICT	**£159.4**	**£55.4**	**£42.3**	**£46.2**	**£40.9**	**£39.0**	**£44.0**	**£27.7**	**£455.0**	**£408.8**
Eastleigh Town Centre	£3.7	£2.8	£7.9	£94.7	£0.4	£2.1	£2.1	£0.6	£114.3	£19.6
Eastleigh Out of Centre	£3.0	£0.7	£7.7	£32.7	£0.5	£1.3	£0.0	£0.3	£46.3	£13.6
Sub-Total	£6.8	£3.5	£15.6	£127.3	£0.9	£3.4	£2.1	£0.9	£160.5	£33.2
Basingstoke Town Centre	£2.7	£3.1	£0.0	£0.0	£2.4	£4.8	£0.3	£0.0	£13.2	£13.2
Brighton Hill Retail Park	£1.3	£2.2	£0.0	£0.0	£0.1	£0.9	£0.0	£0.0	£4.5	£4.5
Other Basingtoke Out of Centre	£0.2	£0.2	£0.0	£2.3	£0.3	£0.0	£0.0	£0.0	£3.1	£0.8
Sub-Total	£4.2	£5.6	£0.0	£2.3	£2.8	£5.7	£0.3	£0.0	£20.9	£18.5
Fareham Town Centre	£0.0	£0.2	£0.3	£0.9	£0.0	£0.4	£18.1	£77.7	£97.7	£96.8
Fareham Out of Centre	£0.0	£0.0	£0.3	£0.8	£0.0	£0.1	£3.7	£26.4	£31.3	£30.6
Sub-Total	£0.0	£0.2	£0.7	£1.6	£0.0	£0.5	£21.9	£104.1	£129.0	£127.4
Southampton City Centre	£45.6	£12.2	£14.8	£54.9	£9.5	£13.9	£15.2	£26.2	£192.4	£137.5
Hedge End Retail Park	£9.2	£6.0	£11.4	£110.8	£2.2	£11.0	£40.8	£36.9	£228.3	£117.4
Other Southampton Out of Centre	£11.5	£0.9	£3.1	£9.0	£1.3	£3.1	£1.4	£6.1	£36.3	£27.3
Sub-Total	£66.3	£19.1	£29.3	£174.7	£13.0	£28.0	£57.4	£69.2	£457.0	£282.3
Portsmouth City Centre	£0.0	£0.0	£0.0	£2.7	£0.0	£0.1	£5.9	£9.7	£18.5	£15.8
Out of Centre Portsmouth	£0.0	£0.6	£0.0	£1.1	£0.4	£0.6	£1.3	£3.0	£7.0	£5.9
Sub-Total	£0.0	£0.6	£0.0	£3.8	£0.4	£0.7	£7.2	£12.7	£25.5	£21.7
Alton	£0.0	£0.1	£0.0	£0.0	£1.2	£1.0	£0.0	£0.0	£2.3	£2.3
Andover	£0.6	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£3.9
Chandlers Ford	£1.1	£0.5	£2.8	£27.2	£0.9	£0.8	£0.2	£0.4	£34.0	£6.8
Romsey	£0.0	£0.0	£0.2	£0.4	£0.4	£0.2	£0.5	£0.0	£1.7	£1.3
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£25.3	£6.3	£32.6	£32.6
All Other	£4.9	£3.4	£2.4	£22.5	£1.3	£12.8	£15.7	£22.4	£85.4	£62.9
OUTSIDE WINCHESTER DISTRICT	**£83.9**	**£36.5**	**£51.0**	**£359.9**	**£20.8**	**£54.0**	**£130.6**	**£216.1**	**£952.8**	**£592.9**
TOTAL MARKET SHARE EXCL SFT	£243.4	£92.0	£93.3	£406.1	£61.6	£93.0	£174.6	£243.8	£1,407.8	£1,001.7

Note: Figures are rounded to the nearest decimal point and may not sum.

TABLE 6: 2036 SURVEY-DERIVED MARKET SHARE ANALYSIS (£M) - ALL COMPARISON GOODS

	Central Winchester	North Winchester	City South	Eastleigh	New Alresford	Upper Meon Valley	Bishop's Waltham	Whiteley & Fareham	Study Area	Excluding Eastleigh (Zone 4)
Zone:	1	2	3	4	5	6	7	8		
Total Available Expenditure (£m):	£257.0	£97.2	£98.5	£433.8	£65.1	£97.6	£184.4	£259.1	£1,492.7	£1,058.9
Winchester Town Centre	£121.9	£32.5	£26.1	£31.2	£18.6	£15.8	£10.3	£1.3	£257.7	£226.5
Whiteley Town Centre	£1.4	£0.0	£0.0	£4.9	£0.2	£0.6	£7.9	£22.7	£37.7	£32.8
Bishop's Waltham District Centre	£0.0	£0.0	£0.0	£1.0	£0.0	£2.7	£22.8	£1.0	£27.4	£26.4
New Alresford District Centre	£1.0	£0.8	£0.0	£0.0	£9.9	£4.5	£0.4	£0.0	£16.5	£16.5
Wickham District Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.2	£4.2	£5.6	£5.6
Local Centres	£0.2	£3.6	£0.8	£1.1	£0.2	£0.2	£3.1	£0.0	£9.2	£8.0
Smaller centres	£5.1	£3.4	£2.7	£1.6	£1.0	£3.1	£0.3	£0.2	£17.4	£15.8
Sub-Total	£129.5	£40.4	£29.5	£39.8	£29.9	£27.1	£45.9	£29.4	£371.5	£331.7
Out of Centre:										£0.0
Andover Road Retail Park	£2.1	£1.0	£0.0	£1.8	£0.2	£0.0	£0.0	£0.0	£5.0	£3.3
Easton Lane	£19.5	£11.7	£3.6	£4.4	£10.0	£10.4	£0.4	£0.1	£60.0	£55.6
Other	£17.3	£5.5	£11.6	£3.4	£3.1	£3.4	£0.2	£0.0	£44.4	£41.1
Sub-Total	£38.9	£18.2	£15.1	£9.5	£13.3	£13.8	£0.6	£0.1	£109.5	£100.0
WINCHESTER DISTRICT	**£168.4**	**£58.6**	**£44.6**	**£49.3**	**£43.2**	**£40.9**	**£46.5**	**£29.5**	**£481.0**	**£431.6**
Eastleigh Town Centre	£4.0	£3.0	£8.3	£101.1	£0.4	£2.2	£2.2	£0.6	£121.8	£20.7
Eastleigh Out of Centre	£3.2	£0.8	£8.1	£34.9	£0.5	£1.4	£0.0	£0.3	£49.3	£14.3
Sub-Total	£7.2	£3.7	£16.5	£136.0	£0.9	£3.6	£2.2	£0.9	£171.1	£35.0
Basingstoke Town Centre	£2.8	£3.3	£0.0	£0.0	£2.5	£5.0	£0.3	£0.0	£13.9	£13.9
Brighton Hill Retail Park	£1.4	£2.3	£0.0	£0.0	£0.1	£0.9	£0.0	£0.0	£4.8	£4.8
Other Basingtoke Out of Centre	£0.3	£0.2	£0.0	£2.5	£0.3	£0.0	£0.0	£0.0	£3.3	£0.8
Sub-Total	£4.5	£5.9	£0.0	£2.5	£2.9	£5.9	£0.3	£0.0	£22.0	£19.5
Fareham Town Centre	£0.0	£0.3	£0.4	£0.9	£0.0	£0.4	£19.2	£82.6	£103.7	£102.8
Fareham Out of Centre	£0.0	£0.0	£0.4	£0.8	£0.0	£0.1	£3.9	£28.1	£33.3	£32.4
Sub-Total	£0.0	£0.3	£0.7	£1.8	£0.0	£0.5	£23.1	£110.7	£137.0	£135.3
Southampton City Centre	£48.2	£12.9	£15.6	£58.7	£10.0	£14.6	£16.0	£27.9	£203.9	£145.3
Hedge End Retail Park	£9.7	£6.4	£12.0	£118.4	£2.3	£11.5	£43.1	£39.2	£242.6	£124.2
Other Southampton Out of Centre	£12.1	£0.9	£3.2	£9.6	£1.4	£3.3	£1.5	£6.5	£38.5	£28.9
Sub-Total	£70.0	£20.2	£30.9	£186.6	£13.7	£29.4	£60.6	£73.6	£485.0	£298.4
Portsmouth City Centre	£0.0	£0.0	£0.0	£2.9	£0.0	£0.1	£6.3	£10.3	£19.6	£16.7
Out of Centre Portsmouth	£0.0	£0.7	£0.0	£1.1	£0.5	£0.6	£1.4	£3.2	£7.4	£6.3
Sub-Total	£0.0	£0.7	£0.0	£4.0	£0.5	£0.7	£7.6	£13.5	£27.1	£23.0
Alton	£0.0	£0.1	£0.0	£0.0	£1.2	£1.0	£0.0	£0.0	£2.4	£2.4
Chandlers Ford	£1.2	£0.6	£3.0	£29.0	£0.9	£0.9	£0.3	£0.4	£36.2	£7.2
Andover	£0.6	£3.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.2	£4.2
Romsey	£0.0	£0.0	£0.2	£0.4	£0.4	£0.2	£0.6	£0.0	£1.8	£1.4
Waterlooville	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£26.7	£6.7	£34.4	£34.4
All Other	£5.2	£3.6	£2.5	£24.0	£1.4	£13.4	£16.5	£23.8	£90.5	£66.5
OUTSIDE WINCHESTER DISTRICT	**£88.7**	**£38.6**	**£53.8**	**£384.4**	**£21.9**	**£56.7**	**£137.9**	**£229.7**	**£1,011.7**	**£627.3**
TOTAL MARKET SHARE EXCL SFT	£257.0	£97.2	£98.5	£433.8	£65.1	£97.6	£184.4	£259.1	£1,492.7	£1,058.9

Note: Figures are rounded to the nearest decimal point and may not sum.

8. Convenience Goods Capacity Assessment

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TABLE 1: ALL CONVENIENCE GOODS - TOTAL TURNOVER ALLOWING FOR INFLOW
Including 'Inflow' from outside Study Area

	'Inflow' from outside Study Area	2019	2024	2029	2034	2036
WinchesterTown						
Co op, City Road, Winchester	5%	£1.4	£1.5	£1.6	£1.6	£1.7
Iceland, Middle Brook Street, Winchester	5%	£4.6	£5.0	£5.3	£5.4	£5.4
Marks & Spencer Foodhall, High Street, Winchester	10%	£7.0	£7.7	£8.2	£8.4	£8.4
M&S Simply Food, Winchester Rail Station, Winchester	10%	£0.8	£0.8	£0.8	£0.8	£0.8
Sainsbury's Superstore, Middlebrook Street, Winchester	10%	£15.4	£17.0	£18.0	£18.3	£18.3
Tesco Express, High Street, Winchester	10%	£4.4	£4.8	£5.1	£5.1	£5.1
Other	10%	£2.1	£2.3	£2.5	£2.5	£2.5
Sub-Total		£35.7	£39.3	£41.6	£42.3	£42.4
Whiteley Town Centre						
Marks & Spencer, Whiteley Way, Whiteley, Fareham	5%	£0.8	£0.8	£0.9	£0.9	£0.9
Lidl, Rookery Avenue, Solent Way, Whiteley	5%	£5.6	£5.8	£6.1	£6.3	£6.3
Tesco Superstore, Whiteley Way, Whiteley	5%	£7.9	£8.1	£8.4	£8.7	£8.7
Sub-Total		£14.3	£14.8	£15.4	£15.8	£16.0
New Alresford District Centre						
Co-op, West Street, Alresford	5%	£5.9	£6.2	£6.5	£6.6	£6.6
Tesco Express, Broad Street, Alresford	5%	£5.4	£5.8	£6.0	£6.1	£6.1
Other	5%	£1.0	£1.1	£1.2	£1.2	£1.2
Sub-Total		£12.3	£13.1	£13.7	£13.9	£13.9
Bishop's Waltham District Centre						
Budgens, Winchester Road, Bishop's Waltham	1%	£8.6	£9.4	£9.9	£10.1	£10.1
Co-op, High Street, Bishop's Waltham	1%	£8.7	£9.5	£10.1	£10.2	£10.3
Other	1%	£2.3	£2.5	£2.6	£2.7	£2.7
Sub-Total		£19.6	£21.3	£22.6	£23.0	£23.0
Wickham District Centre						
Co-op, The Square, Wickham	5%	£5.3	£5.5	£5.8	£5.9	£6.0
Other	5%	£1.5	£1.6	£1.6	£1.7	£1.7
Sub-Total		£6.8	£7.1	£7.4	£7.6	£7.7
Weeke Local Centre						
Aldi, Burnett Close, Winchester	5%	£25.9	£28.4	£30.2	£30.7	£30.8
Waitrose, Stockbridge Road, Winchester	5%	£19.9	£22.0	£23.5	£23.9	£24.0
Other	1%	£1.9	£2.1	£2.2	£2.3	£2.3
Sub-Total		£47.8	£52.5	£55.9	£57.0	£57.0
Smaller Centres						
Badger Farm Local Centre	1%	£0.0	£0.0	£0.0	£0.0	£0.0
Oliver's Battery Local Centre	1%	£0.1	£0.1	£0.1	£0.1	£0.1
Denmead Local Centre	1%	£2.3	£2.5	£2.7	£2.7	£2.7
Kings Worthy Local Centre	1%	£3.6	£3.8	£4.1	£4.2	£4.2
Stockbridge Road/Andover Road Local Centre	1%	£2.4	£2.7	£2.9	£2.9	£2.9
Village centres/ neighbourhood stores	1%	£14.7	£15.8	£16.6	£16.9	£16.9
Sub-Total		£23.1	£25.0	£26.4	£26.8	£26.9
Out of Centre						
Sainsbury's Superstore, Badger Farm Road, Winchester	2%	£42.7	£46.6	£49.3	£50.3	£50.4
Tesco Extra, Easton Lane, Winchester	2%	£45.9	£49.4	£51.8	£52.6	£52.7
Other		£0.3	£0.4	£0.4	£0.4	£0.4
Sub-Total		£89.0	£96.3	£101.5	£103.3	£103.5
TOTAL TURNOVER		£248.5	£269.4	£284.5	£289.7	£290.3

Notes: Assume constant market shares over forecast period.

TABLE 2: FORECAST TURNOVER OF COMMITTED CONVENIENCE GOODS FLOORSPACE
(i.e. with planning permission or under construction at the time of preparing the capacity assessment)

Committed scheme/site location	Planning Ref	Gross Floorspace (sqm)	Net Sales Convenience Floorspace	Sales Density 2019 (£/sqm)	Turnover (£m) 2019	2024	2029	2034	2036
Station Approach - mixed use scheme	19/00601/OUT	474	332	£12,000	£4.0	£4.1	£4.1	£4.2	£4.2
Barton Farm Local Centre - foodstore	09/02412/OUT	2,000	1120	£9,000	£10.1	£10.3	£10.5	£10.7	£10.8
Barton Farm Local Centre - convenience units	09/02412/OUT	250	175	£6,000	£1.1	£1.1	£1.1	£1.11	£1.12
West of Waterlooville Local Centre - retail provision	10/02862/OUT	500	350	£6,000	£2.1	£2.1	£2.2	£2.22	£2.24
Total Committed Convenience Goods Turnover:					£17.2	£17.5	£17.9	£18.2	£18.4

Note: where the exact convenience floorspace has not been specified by planning permission, LSH estimated the likely figure.
It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

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TABLE 3: WINCHESTER DISTRICT - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£248.5	£269.4	£284.5	£289.7	£290.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) [(1)]:	£248.5	£253.2	£257.8	£263.0	£265.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£16.2	£26.7	£26.6	£25.1
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		£17.5	£17.9	£18.2	£18.4
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.4	£8.9	£8.4	£6.8
STEP 6:	**CAPACITY FOR CONVENIENCE FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
	(ii) Net Floorspace Capacity (sq m):	**-**	**-137**	**853**	**795**	**634**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-195	1,219	1,136	906

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and supermarket (e.g. Co-op, Budgens, etc) and limited assortment discount (LAD) operators (e.g. Aldi and Lidl).

Forecasts on expenditure, turnover and floorspace capacity are not reliable beyond a 10 year period. This is evident in longer term forecasts (e.g. 2036) where productivity/ efficiency growth forecasts for convenience floorspace overtake forecast expenditure growth rages for convenience goods beyond 2034. As a result, there is a reduction in residual expenditure to support new floorspace by 2036.

TABLE 4: WINCHESTER TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£35.7	£39.3	£41.6	£42.3	£42.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£35.7	£36.4	£37.0	£37.8	£38.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£2.9	£4.6	£4.5	£4.3
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		£4.1	£4.1	£4.2	£4.2
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£1.2	£0.4	£0.3	£0.0
STEP 6:	**CAPACITY FOR CONVENIENCE FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
	(ii) Net Floorspace Capacity (sq m):	**-**	**-115**	**41**	**29**	**3**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-164	58	42	4

TABLE 5: WHITELEY TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£14.3	£14.8	£15.4	£15.8	£16.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£14.3	£14.5	£14.8	£15.1	£15.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.6	£0.75	£0.75
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.24	£0.64	£0.75	£0.75
STEP 6:	**CAPACITY FOR CONVENIENCE FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
	(ii) Net Floorspace Capacity (sq m):	**-**	**24**	**62**	**71**	**70**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		34	89	101	100

TABLE 6: NEW ALRESFORD DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£12.3	£13.1	£13.7	£13.9	£13.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£12.3	£12.5	£12.8	£13.0	£13.1
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.6	£1.0	£0.9	£0.8
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.56	£0.95	£0.86	£0.76
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**56**	**92**	**81**	**71**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		79	131	116	101

TABLE 7: BISHOP'S WALTHAM DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£19.6	£21.3	£22.6	£23.0	£23.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£19.6	£19.9	£20.3	£20.7	£20.9
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.4	£2.3	£2.3	£2.1
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	n/a	n/a	n/a	n/a
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£1.39	£2.28	£2.28	£2.15
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**137**	**220**	**215**	**201**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		196	314	307	287

TABLE 8: WICKHAM DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£6.8	£7.1	£7.4	£7.6	£7.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£6.8	£6.98	£7.11	£7.25	£7.31
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.12	£0.32	£0.36	£0.35
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	n/a	n/a	n/a	n/a
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.12	£0.32	£0.36	£0.35
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**12**	**31**	**34**	**33**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		17	44	48	47

TABLE 9: WEEKE LOCAL CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£47.8	£52.5	£55.9	£57.0	£57.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£47.8	£48.7	£49.6	£50.6	£51.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£3.9	£6.4	£6.4	£6.1
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.8	£2.9	£2.9	£3.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£1.0	£3.5	£3.4	£3.1
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**101**	**334**	**325**	**290**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		144	477	465	414

Note: Turnover for committed development assumes that 25% of the turnover of convenience from Barton Farm will be diverted from foodstores in Weeke.

TABLE 10: OTHER SMALLER CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£23.1	£25.0	£26.4	£26.8	£26.9
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£23.1	£23.5	£23.9	£24.4	£24.6
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.5	£2.5	£2.4	£2.3
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	n/a	n/a	n/a	n/a
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£1.5	£2.5	£2.4	£2.3
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**146**	**237**	**228**	**211**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		208	338	325	301

TABLE 11: REST OF DISTRICT / OUT OF CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£89.0	£96.3	£101.5	£103.3	£103.5
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£89.0	£90.7	£92.3	£94.2	£95.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£5.6	£9.1	£9.1	£8.5
STEP 4: TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£10.6	£10.8	£11.1	£11.1
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£5.0	-£1.7	-£2.0	-£2.6
STEP 6: **CAPACITY FOR CONVENIENCE FLOORSPACE:**					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£10,000	£10,131	£10,376	£10,585	£10,670
(ii) Net Floorspace Capacity (sq m):	**-**	**-497**	**-163**	**-188**	**-244**
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-710	-233	-268	-349

Note: Turnover for committed development includes turnover from West of Waterlooville Local Centre and 50% of the turnover of convenience from Barton Farm.

TABLE 12: SUMMARY FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE BY CENTRE (NET SQ M)
Assume Equilibrium at 2018 and Constant Market Shares

	2024	2029	2034	2036
Winchester Town	-115	41	29	3
Whiteley District Centre	24	62	71	70
New Alresford District Centre	56	92	81	71
Bishop's Waltham District Centre	137	220	215	201
Wickham District Centre	12	31	34	33
Weeke Local Centre	101	334	325	290
All Other Local Centres, Smaller Centres & Local Stores	146	237	228	211
Rest of District/Out of Centre	-497	-163	-188	-244
Winchester District	-137	853	795	634

9. Comparison Goods Capacity Assessment

TABLE 1: ALL COMPARISON GOODS - TOTAL TURNOVER
Including 'Inflow' from outside Study Area

	'Inflow' from outside Study Area	2019	2024	2029	2034	2036
Winchester Town Centre	20%	£185.9	£222.9	£263.9	£304.7	£322.1
Whiteley District Centre	10%	£24.7	£29.0	£34.0	£39.4	£41.9
New Alresford District Centre	5%	£10.5	£12.4	£14.4	£16.5	£17.4
Bishop's Waltham District Centre	2%	£16.3	£19.5	£23.0	£26.5	£28.0
Wickham District Centre	5%	£3.5	£4.1	£4.8	£5.6	£5.9
All Local Centres	1%	£5.3	£6.4	£7.6	£8.7	£9.2
All Other Smaller Centres & Local Stores	1%	£10.4	£12.4	£14.5	£16.7	£17.6
Rest of District/ Out of Centre	5%	£67.5	£80.4	£94.7	£109.1	£115.2
TOTAL DISTRICT TURNOVER		£324.0	£387.0	£456.9	£527.2	£557.4

Notes: Assume constant market shares over forecast period.

TABLE 2: FORECAST TURNOVER OF COMMITTED COMPARISON GOODS FLOORSPACE

Committed scheme/site location	Planning Ref	Gross Floorspace (sqm)	Net Sales Comparison Floorspace (sqm)	Sales Density 2018 (£/sqm)	Turnover (£m)				
					2019	2024	2029	2034	2036
Station Approach - mixed use scheme	19/00601/OUT	474	332	£6,000	£2.0	£2.3	£2.6	£3.1	£3.3
Barton Farm Local Centre - foodstore (ancillary comparison floorspace)	09/02412/OUT	2,000	280	£3,500	£1.0	£1.1	£1.3	£1.5	£1.6
Barton Farm Local Centre - other comparison floorspace	09/02412/OUT	250	175	£3,500	£0.6	£0.7	£0.8	£0.9	£1.0
West of Waterlooville Local Centre - retail provision	10/02862/OUT	500	350	£4,000	£1.4	£1.6	£1.9	£2.2	£2.3
Total Committed Comparison Goods Turnover:					£5.0	£5.7	£6.6	£7.7	£8.2

Notes:
Includes schemes with planning permission or under construction at the time of preparing the capacity assessment.
Where the exact comparison goods floorspace has not been specified by planning permission, LSH estimated the likely figure.
It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

TABLE 3: WINCHESTER DISTRICT - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£324.0	£387.0	£456.9	£527.2	£557.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£324.0	£371.3	£430.0	£500.9	£532.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£15.7	£26.9	£26.3	£24.9
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		£5.7	£6.6	£7.7	£8.2
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£10.0	£20.3	£18.6	£16.7
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**1,676**	**2,961**	**2,329**	**1,852**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		2,395	4,230	3,327	2,646

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the District's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 17* (February 2020) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on an average sales density for comparison goods retail floorspace from Mintel Retail Ranking and adjusted to take account of the local market.

Forecasts on expenditure, turnover and floorspace capacity are not reliable beyond a 10 year period. This is evident in longer term forecasts (e.g. 2036) where productivity/ efficiency growth forecasts for comparison floorspace overtake forecast expenditure growth rages for comparison goods beyond 2034. As a result, there is a reduction in residual expenditure to support new floorspace by 2036.

TABLE 4: WINCHESTER TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£185.9	£222.9	£263.9	£304.7	£322.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£185.9	£213.0	£246.7	£287.4	£305.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£9.9	£17.2	£17.3	£16.6
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		£2.3	£2.6	£3.1	£3.3
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£7.6	£14.6	£14.2	£13.4
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**1,279**	**2,122**	**1,780**	**1,479**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		1,827	3,032	2,543	2,112

TABLE 5: WHITELEY TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£24.7	£29.0	£34.0	£39.4	£41.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£24.7	£28.3	£32.7	£38.1	£40.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.7	£1.2	£1.3	£1.3
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	£0.7	£1.2	£1.3	£1.3
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**123**	**181**	**164**	**149**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		176	259	235	213

TABLE 6: BISHOP WALTHAM TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£16.3	£19.5	£23.0	£26.5	£28.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£16.3	£18.6	£21.6	£25.1	£26.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.8	£1.4	£1.4	£1.3
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.8	£1.4	£1.4	£1.3
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**140**	**208**	**170**	**140**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		199	296	243	199

TABLE 7: NEW ALRESFORD TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£10.5	£12.4	£14.4	£16.5	£17.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£10.5	£12.0	£14.0	£16.3	£17.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.3	£0.5	£0.3	£0.1
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.3	£0.5	£0.3	£0.1
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**54**	**70**	**33**	**15**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		77	100	47	22

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TABLE 8: WICKHAM TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£3.5	£4.1	£4.8	£5.6	£5.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£3.5	£4.0	£4.6	£5.4	£5.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.1	£0.1	£0.1	£0.1
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.1	£0.1	£0.1	£0.1
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**15**	**21**	**17**	**15**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		21	30	25	22

TABLE 9: LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£5.3	£6.4	£7.6	£8.7	£9.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£5.3	£6.1	£7.0	£8.2	£8.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.3	£0.6	£0.6	£0.6
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.3	£0.6	£0.6	£0.6
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**53**	**81**	**73**	**63**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		76	116	104	90

TABLE 10: SMALLER CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£10.4	£12.4	£14.5	£16.7	£17.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£10.4	£12.0	£13.9	£16.1	£17.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.4	£0.6	£0.5	£0.4
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		n/a	n/a	n/a	n/a
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		£0.4	£0.6	£0.5	£0.4
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**67**	**94**	**66**	**50**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		95	134	95	71

TABLE 11: REST OF BOROUGH/ OUT OF CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2019	2024	2029	2034	2036
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£67.5	£80.4	£94.7	£109.1	£115.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) :	£67.5	£77.3	£89.5	£104.3	£110.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£3.1	£5.2	£4.8	£4.4
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)		£3.4	£4.0	£4.6	£4.9
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):**		**-£0.3**	**£1.3**	**£0.2**	**-£0.5**
STEP 6:	**CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,500	£5,963	£6,866	£7,999	£9,038
	(ii) Net Floorspace Capacity (sq m):	**-**	**-54**	**184**	**24**	**-58**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-77	263	35	-83

TABLE 12: SUMMARY COMPARISON GOODS CAPACITY ASSESSMENT (SQM NET)

Assume Equilibrium at 2019 and Constant Market Shares

	2024	2029	2034	2036
Winchester Town Centre	1,279	2,122	1,780	1,479
Whiteley District Centre	123	181	164	149
Bishop's Waltham District Centre	140	208	170	140
New Alresford District Centre	54	70	33	15
Wickham District Centre	15	21	17	15
All Local Centres	53	81	73	63
All Other Smaller Centres & Local Stores	67	94	66	50
Rest of District/ Out of Centre	-54	184	24	-58
Total: Winchester District	1,676	2,961	2,329	1,852

10. Leisure Expenditure Assessment

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TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2019 - 2036)

	2019	2024	2029	2034	2036
Zone 1 Central Winchester	42,290	46,372	49,450	50,240	50,245
Zone 2 North Winchester	12,960	14,211	15,154	15,396	15,398
Zone 3 City South	13,465	14,765	15,745	15,996	15,998
Zone 4 Eastleigh	64,794	67,915	70,706	73,090	73,944
Zone 5 New Alresford	8,537	9,361	9,983	10,142	10,143
Zone 6 Upper Meon Valley	14,537	14,354	14,142	13,925	13,837
Zone 7 Bishop's Waltham	24,523	26,891	28,676	29,133	29,137
Zone 8 Whiteley & Fareham	40,096	42,174	43,934	44,931	45,228
Study Area	221,201	236,043	247,789	252,853	253,930
Winchester District	127,932	138,697	146,738	148,638	148,566

Source: Experian Business Strategies - MMG3 Geographic Information Systmes (GIS) '*Retail Area Planner Population & Expenditure Datasets*'

Notes: Population projections (2019 to 2036) for Zones 1 to 3 and 5 to 8 (Winchester electoral wards only) are linked to Winchester City Council's 'Future Local Housing Need Assessment and Strategic Housing and Market Area Assessment (SHMAA).

Population projections for Zone 4 and Fareham Borough electoral wards situated in Zone 8 (excluding Winchester wards) are derived from Experian, which are based on ONS 2014-based Sub-National Population Projections (released in May

TABLE 2: COMMERCIAL LEISURE EXPENDITURE PER HEAD (2017 prices)

	Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation and sport	Restaurants, cafes etc	Total
Zone 1 Central Winchester	£225	£324	£115	£126	£158	£1,394	£2,341
Zone 2 North Winchester	£323	£332	£100	£155	£167	£1,384	£2,459
Zone 3 City South	£301	£337	£108	£162	£181	£1,463	£2,550
Zone 4 Eastleigh	£247	£334	£136	£139	£147	£1,366	£2,369
Zone 5 New Alresford	£345	£344	£114	£170	£173	£1,391	£2,537
Zone 6 Upper Meon Valley	£428	£356	£92	£181	£211	£1,453	£2,721
Zone 7 Bishop's Waltham	£321	£335	£105	£155	£163	£1,362	£2,441
Zone 8 Whiteley & Fareham	£252	£320	£124	£135	£146	£1,306	£2,282
Study Area Average	£305	£335	£112	£153	£168	£1,390	£2,463

TABLE 3: ANNUAL LEISURE EXPENDITURE GROWTH - 2019 to 2036

	2018	2019	2020	2021	2022-26	2027-36
Annual Leisure expenditure growth	-1.5%	-0.5%	0.9%	1.0%	1.2%	1.2%

Source: Experian Business Strategies, Retail Planner Briefing Note 17 (February 2020)

TABLE 4: TOTAL AVAILABLE EXPENDITURE FOR ALL COMMERICAL LEISURE- 2019 to 2036

	2019	2024	2029	2034	2036	Growth 2019-2029		Growth 2019-2036	
Zone 1 Central Winchester	£97.0	£112.4	£127.2	£137.2	£140.5	£30.2	31.1%	£43.5	44.8%
Zone 2 North Winchester	£31.2	£36.2	£40.9	£44.2	£45.2	£9.7	31.1%	£14.0	44.8%
Zone 3 City South	£33.7	£39.0	£44.1	£47.6	£48.7	£10.5	31.1%	£15.1	44.8%
Zone 4 Eastleigh	£150.5	£166.6	£184.1	£202.0	£209.3	£33.6	22.3%	£58.8	39.1%
Zone 5 New Alresford	£21.2	£24.6	£27.8	£30.0	£30.7	£6.6	31.1%	£9.5	44.8%
Zone 6 Upper Meon Valley	£38.8	£40.4	£42.3	£44.2	£45.0	£3.5	9.1%	£6.2	16.0%
Zone 7 Bishop's Waltham	£58.7	£67.9	£76.9	£82.9	£85.0	£18.2	31.1%	£26.3	44.8%
Zone 8 Whiteley & Fareham	£89.7	£99.6	£110.2	£119.6	£123.3	£20.5	22.8%	£33.6	37.5%
Study Area Total	£520.7	£586.7	£653.6	£707.6	£727.7	£132.8	25.5%	£207.0	39.7%

TABLE 5: TOTAL AVAILABLE EXPENDITURE FOR CAFES & RESTAURANTS - 2019 to 2036

	2019	2024	2029	2034	2036	Growth 2019-2029		Growth 2019-2036	
Zone 1 Central Winchester	£57.8	£66.9	£75.7	£81.7	£83.7	£18.0	31.1%	£25.9	44.8%
Zone 2 North Winchester	£17.6	£20.4	£23.0	£24.8	£25.4	£5.5	31.1%	£7.9	44.8%
Zone 3 City South	£19.3	£22.4	£25.3	£27.3	£27.9	£6.0	31.1%	£8.6	44.8%
Zone 4 Eastleigh	£86.8	£96.0	£106.1	£116.5	£120.7	£19.4	22.3%	£33.9	39.1%
Zone 5 New Alresford	£11.6	£13.5	£15.3	£16.5	£16.9	£3.6	31.1%	£5.2	44.8%
Zone 6 Upper Meon Valley	£20.7	£21.6	£22.6	£23.6	£24.0	£1.9	9.1%	£3.3	16.0%
Zone 7 Bishop's Waltham	£32.7	£37.9	£42.9	£46.3	£47.4	£10.2	31.1%	£14.7	44.8%
Zone 8 Whiteley & Fareham	£51.3	£57.0	£63.0	£68.4	£70.6	£11.7	22.8%	£19.2	37.5%
Study Area Average	£297.8	£335.6	£374.0	£405.0	£416.5	£76.2	25.6%	£118.7	39.9%

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