



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Petersfield Retail Study

South Downs National Park

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1.0 **Introduction**

Background

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by East Hampshire District Council to prepare a Retail Need and Town Centres Study in 2007. Due to recent changes in population and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned to undertake an update of this study focusing on the retail floorspace projections for Petersfield on behalf of South Downs National Park authority (SDNP).

Report Structure

- 1.2 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 sets out the updated retail capacity and quantitative need assessment. Section 4 provides the recommendations and conclusions.

2.0 **Recent Changes and Trends**

The Need for the Study Update

- 2.1 The previous 2007 study provided floorspace projections from 2006 up to 2026. These projections need to be updated in terms of population and expenditure projections and benchmark turnover figures.
- 2.2 Central government guidance in PPS4 has been replaced by the National Planning Policy Framework (NPPF) and this has implications for plan making and development control decisions.

The National Planning Policy Framework

- 2.3 The 2007 Study Update was based on the guidance set out in PPS6. This guidance was superseded by PPS4 and then the NPPF published by the Department for Communities and Local Government on 27 March 2012. The NPPF sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) (including PPS4).and Planning Policy Guidance Notes (PPGs) with a single national planning policy document.
- 2.4 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):
- Local planning authorities should positively seek opportunities to meet development needs of their area;
 - Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted.
- 2.5 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).
- 2.6 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).
- 2.7 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

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

2.8

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

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

- 2.9 Applications for retail and town centre uses that are not in Petersfield town centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.
- 2.10 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).
- 2.11 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:
- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.
- 2.12 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

The Economic Downturn

- 2.13 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.
- 2.14 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also

need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

- 2.15 A revised assessment of the need for retail facilities in Petersfield is set out in Section 3.0 of this report. This section provides an overview of national trends within the retail sector.

Expenditure Growth

- 2.16 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.
- 2.17 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990's. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in the region.

New Forms of Retailing

- 2.18 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Hampshire. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Petersfield.
- 2.19 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 9 (Sept 2011)). Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:

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

- 2.20 In addition to new forms of retailing, retail operators have responded to changes in customers’ requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer’s Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi and Lidl was rapid and their expansion continues albeit at a slower rate.
- 2.21 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.
- 2.22 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are now fewer DIY operators and B&Q and Homebase have scaled down or closed their stores e.g. the Focus store in Petersfield has closed.
- 2.23 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country.
- 2.24 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in Petersfield. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.
- 2.25 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in Petersfield with

smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

2.26

Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Southampton, Portsmouth, Winchester and Guildford. Demand from multiples within Petersfield is likely to be weaker, which will affect the appropriate strategies for individual centres.

3.0 Retail Capacity Update

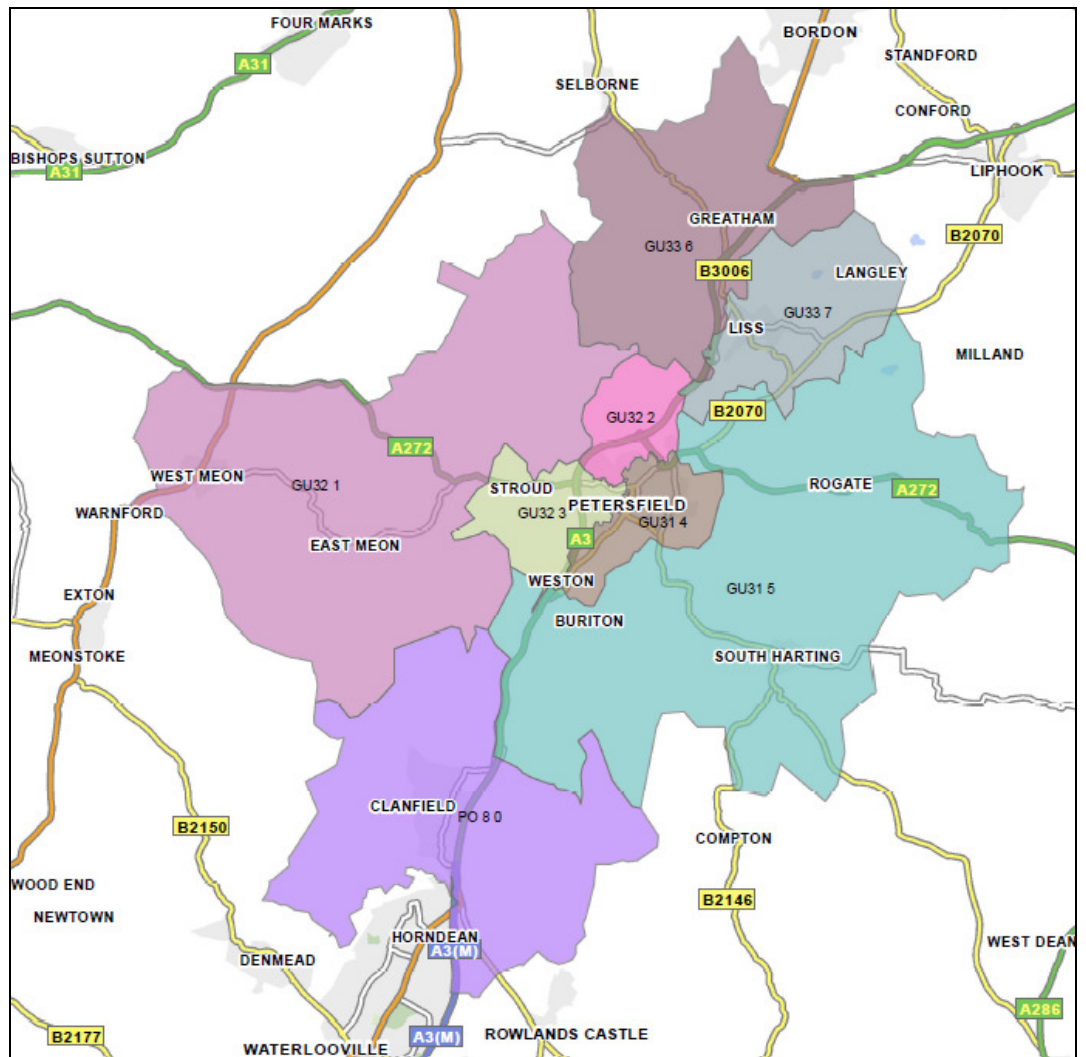
Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Petersfield up to 2026. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary values expressed in this analysis are at 2010 prices unless stated otherwise. The previous 2007 Study was based on 2005 prices and therefore the figures are not directly comparable.

Methodology and Data

3.3 The quantitative analysis is based on a study area defined for Petersfield, as defined in the 2007 Retail Study. A copy of the study area postcode zones is shown below.



Consumer Expenditure

- 3.4 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2010 have been obtained.
- 3.5 Experian's EBS (Experian Business Strategies) national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). For medium and long term projections we have adopted the mid-point between Experian's forecast growth rates (0.55% per annum for convenience goods and 3% for comparison). We believe that the EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the short term.

Population

- 3.6 Census of Population figures for 2011, Sub-National Population Projections (SNPP) 2010 and Hampshire County Council small area population projections have been adopted.
- 3.7 The study area population for 2010 to 2026 on this basis as set out in Table 1 in Appendix 1.

Available Spending

- 3.8 The levels of available spending are derived by combining the population in Table 1 with per capita spending figures in Table 2.
- 3.9 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.10 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of Trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.
- 3.11 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3.7% and 8.8% of total convenience and comparison goods expenditure respectively in 2010. The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by

2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

- 3.12 As a consequence of growth in population and per capita spending, baseline convenience goods spending within the study area is forecast to increase from £83.01 million in 2012 to £93.97 million in 2026, as shown in Table 3 in Appendix 1.
- 3.13 Comparison goods spending is forecast to increase from £128.87 million in 2012 to £202.73 million in 2026, as shown in Table 3 in Appendix 2. These figures relate to real growth and exclude inflation.

Existing Spending Patterns 2012

Convenience Shopping

- 3.14 The results of the household shopper questionnaire survey, undertaken by NEMS in May 2012 have been used to update estimates of existing shopping patterns within the study area. The market shares derived from the survey results are shown in Table 4.
- 3.15 Table 5 in Appendix 1 indicates that the level of convenience goods expenditure attracted to shops/stores in the Petersfield in 2012 is estimated to be £60.81 million.
- 3.16 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 6 in Appendix 1, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 3.17 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 6 in Appendix 1, for consistency with the use of goods based expenditure figures.
- 3.18 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,000 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Petersfield is £49.39 million. These figures suggest that collectively convenience retail facilities in Petersfield are trading 23% above average levels.

Comparison Shopping

- 3.19 Petersfield attracts £44.94 million of comparison goods expenditure in total in 2012 (Table 5 in Appendix 2). In 2006 comparison was estimated to be trading at £55.98 million, which suggest comparison turnover has decreased by 19.7% between 2006 and 2012. The main reasons for this difference are:
- a reduction in Petersfield's market share of expenditure within the catchment area;
 - the closure of the Focus DIY store (with a turnover of at least £2 million), which partly explains the reduction in market share;
 - comparison expenditure deflation between 2006 and 2010 (-1.1%);
 - an increase in the proportion of special forms of trading (e.g. home shopping) from 6% in 2006 to 10.9% in 2012.
- 3.20 On balance, comparison shopping facilities within Petersfield appear to be trading less healthily than in 2006.

Quantitative Capacity for Convenience Floorspace

- 3.21 The level of available convenience goods expenditure in 2016, 2021 and 2026 is shown at Tables 7 to 9 in Appendix 1.
- 3.22 The total level of available convenience goods expenditure available for shops in Petersfield between 2012 and 2031 is summarised in Table 10 (Appendix 1). The benchmark turnover of existing convenience floorspace and the Tesco extension commitment has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.23 The estimates of surplus expenditure are converted into net floorspace projections in Table 10 in Appendix 1. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. The projections assume that the new floorspace would be occupied by the main food store operators, trading at a sales density of £10,000 per sq m net.
- 3.24 There is currently a £11.42 million surplus of convenience expenditure in 2012. The Tesco extension will reduce this surplus to £5.63 million. By 2016 this surplus will increase to £7.40 million, and will be £13.66 million in 2026. These figures are based on constant market shares.

Quantitative Capacity for Comparison Floorspace

- 3.25 We have projected the level of comparison goods expenditure available to shops in Petersfield at 2016, 2021 and 2026 as shown in Tables 5 to 8 in Appendix 2.
- 3.26 Future available expenditure is compared with the projected turnover of existing and retail facilities within Petersfield in order to provide estimates of surplus expenditure, as shown in Table 9.

- 3.27 Trends indicate that comparison retailers historically will achieve growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Evidence suggest the turnover of existing floorspace has decreased between 2006 and 2012.
- 3.28 Table 9 assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted as recommended by Experian.

Retail Floorspace Projections

- 3.29 Surplus convenience expenditure has been converted into net floorspace projections in Table 10, Appendix 1. Within Petersfield 563 net sq m of convenience floorspace could be supported in 2012, over and above the Tesco extension. This convenience goods floorspace projection increases to 740 net sq m by 2016, 1,016 sq m net by 2021 and 1,366 sq m net by 2026.
- 3.30 Surplus comparison expenditure has been converted into comparison floorspace projections in Table 9 in Appendix 2. This table suggest the Tesco extension commitment will absorb comparison goods expenditure growth up to and beyond 2021, and there are negative floorspace projections up to 2021.
- 3.31 Surplus expenditure at 2026 could support 358 sq m net of comparison goods floorspace in Petersfield as a whole. This figure does not take into account the potential net loss of comparison floorspace within the former Focus DIY store, if it is occupied by non-comparison retailing (about 1,250 sq m net). If the Focus store is not occupied by comparison goods retailing then it would be appropriate to increase the floorspace projections in Table 9 by 1,250 sq m net. The projections would be 635 sq m net at 2021 and 1,608 sq m net by 2026.
- 3.32 These floorspace projections assume that new shopping facilities within Petersfield can help to maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new retail floorspace and the appropriate location for this development, as follows:
- major retail developments in competing centres;
 - the re-occupation of vacant retail floorspace;
 - the availability of land to accommodate new development;
 - the reliability of long term expenditure projections, particularly after 2021;
 - the effect of Internet/home shopping on the demand for retail property;
 - the level of retail operator demand for floorspace;
- 3.33 Projections up to 2016 are based on up-to-date forecasts, which take into account the effects of the recession. The long term floorspace projections (beyond 2016) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Medium and long term

forecasts may be subject to change due to unforeseen circumstances. Medium and long term projections should be monitored and kept under review.

3.34

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

4.0 **Conclusions**

- 4.1 This report provides an update of the capacity for retail development in Petersfield. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Petersfield

- 4.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period.
- 4.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.
- 4.4 Long term forecasts beyond 2016 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding Petersfield should also be monitored along with the affect proposals may have on the demand for additional development in Petersfield.

Retail Floorspace Projections

- 4.5 The capacity projections for Petersfield suggest 740 sq m net of convenience goods floorspace could be supported by 2016, over and above the Tesco commitment. This would increase to 1,366 sq m net by 2026. The comparison goods floorspace projections show negative figures up to 2021 due to the Tesco extension commitment, and a small requirement at 2026 (358 sq m net). However if the former Focus unit is not reoccupied by comparison goods retailing then the floorspace projection would be 1,608 sq m net at 2026.
- 4.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Petersfield. The projections also assume the market share of Petersfield will remain unchanged in the future. If a retail development proposal within a town centre exceeds the respective floorspace projection for the town, then this does not necessarily mean the proposal should be refused planning permission, subject to the development being consistent with the role, character and catchment area of the town centre. For example a town centre development could divert trade from out-of-centre stores, which could be a positive benefit of the proposed development.

Appendix 1 Convenience Goods Capacity

Table 1 : Population Projections

Area	2010	2012	2016	2021	2026
GU 31 4 (Petersfield East)	7,496	7,722	7,898	8,053	8,279
GU 32 2 (Petersfield North West)	3,606	3,715	3,799	3,874	3,983
GU 32 3 (Petersfield South West)	4,965	5,115	5,231	5,334	5,483
GU 31 5 (Rural East)	3,525	3,631	3,714	3,787	3,893
GU 32 1 (Rural West)	3,181	3,277	3,351	3,417	3,513
GU 33 6 (West Liss)	1,812	1,867	1,909	1,947	2,001
GU 33 7 (East Liss)	6,376	6,569	6,718	6,850	7,042
PO 8 0 (Horndean)	9,105	9,380	9,593	9,781	10,056
Total	40,066	41,276	42,213	43,042	44,250

Sources:

Experian 2010 Small Area Population

2011 Census of Population figures

Hampshire CC Small Area population growth rates to 2018

ONS 2010 Sub-national population growth rates 2018 to 2026

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

Area	2012	2016	2021	2026
GU 31 4 (Petersfield East)	£2,009	£2,022	£2,070	£2,122
GU 32 2 (Petersfield North West)	£1,860	£1,871	£1,916	£1,964
GU 32 3 (Petersfield South West)	£1,869	£1,881	£1,926	£1,974
GU 31 5 (Rural East)	£2,170	£2,184	£2,236	£2,292
GU 32 1 (Rural West)	£2,160	£2,173	£2,225	£2,281
GU 33 6 (West Liss)	£2,158	£2,172	£2,224	£2,279
GU 33 7 (East Liss)	£1,980	£1,992	£2,040	£2,091
PO 8 0 (Horndean)	£2,029	£2,042	£2,091	£2,143

Experian local estimates for 2010 convenience goods expenditure per capita

Excluding special forms of trading

Experian Business Strategies - recommended forecast growth rates (0.5% and 0.6% per annum)

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

Area	2012	2016	2021	2026
GU 31 4 (Petersfield East)	£15.52	£15.97	£16.67	£17.57
GU 32 2 (Petersfield North West)	£6.91	£7.11	£7.42	£7.82
GU 32 3 (Petersfield South West)	£9.56	£9.84	£10.27	£10.82
GU 31 5 (Rural East)	£7.88	£8.11	£8.47	£8.92
GU 32 1 (Rural West)	£7.08	£7.28	£7.60	£8.01
GU 33 6 (West Liss)	£4.03	£4.15	£4.33	£4.56
GU 33 7 (East Liss)	£13.01	£13.38	£13.97	£14.72
PO 8 0 (Horndean)	£19.03	£19.59	£20.45	£21.55
Total	£83.01	£85.43	£89.19	£93.97

Sources:

Table 1 and Table 2

Table 4: Convenience Shopping Penetration Rates 2012

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow
Petersfield									
Waitrose, Rams Walk	26.9%	35.5%	32.4%	33.8%	25.6%	24.0%	17.0%	6.2%	20%
Tesco, The Causeway	47.0%	40.2%	39.6%	30.7%	36.8%	10.5%	19.7%	4.3%	20%
Other Petersfield Shops	15.0%	12.3%	13.0%	13.4%	11.6%	4.6%	4.6%	3.2%	10%
	88.9%	88.0%	85.0%	77.9%	74.0%	39.0%	41.4%	13.6%	
Other									
Alton	1.3%	0.8%	2.0%	0.0%	1.5%	5.2%	0.0%	0.0%	n/a
Bordon	0.4%	0.0%	0.0%	0.5%	2.2%	24.7%	7.5%	0.6%	n/a
Liss	0.0%	1.6%	0.9%	0.5%	1.1%	14.6%	24.9%	0.0%	n/a
Liphook	2.3%	0.8%	2.0%	3.4%	1.0%	11.9%	17.8%	0.6%	n/a
Morrisons, Horndean	3.4%	2.5%	2.3%	2.9%	3.0%	0.0%	1.9%	49.4%	n/a
Havant/Waterlooville	2.2%	3.3%	7.3%	5.4%	4.9%	0.0%	4.7%	32.7%	n/a
Elsewhere	1.5%	2.9%	0.6%	9.4%	12.4%	4.5%	1.9%	3.1%	n/a
	11.1%	12.0%	15.0%	22.1%	26.0%	61.0%	58.6%	86.4%	
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: *Market shares based on household survey May 2012*

Table 5: Convenience Expenditure Shopping Patterns 2012 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2012	15.52	6.91	9.56	7.88	7.08	4.03	13.01	19.03		
Petersfield										
Waitrose, Rams Walk	3.92	2.34	2.96	2.58	1.74	0.96	2.18	1.18	4.46	22.30
Tesco, The Causeway	7.80	2.98	4.05	2.59	2.79	0.45	2.75	0.87	6.07	30.33
Other Petersfield Shops	2.18	0.81	1.18	1.02	0.79	0.18	0.59	0.60	0.82	8.17
	13.90	6.12	8.19	6.19	5.31	1.59	5.52	2.64	11.34	60.81
Other										
Alton	0.19	0.05	0.18	0.00	0.10	0.21	0.00	0.00	n/a	0.74
Bordon	0.06	0.00	0.00	0.04	0.15	0.99	0.96	0.12	n/a	2.33
Liss	0.00	0.11	0.08	0.04	0.07	0.58	3.18	0.00	n/a	4.07
Liphook	0.34	0.05	0.18	0.26	0.07	0.48	2.27	0.11	n/a	3.76
Morrisons, Horndean	0.49	0.16	0.21	0.22	0.20	0.00	0.24	9.37	n/a	10.89
Havant/Waterlooville	0.31	0.22	0.66	0.42	0.33	0.00	0.60	6.20	n/a	8.74
Elsewhere	0.22	0.19	0.06	0.72	0.84	0.18	0.24	0.58	n/a	3.02
	1.62	0.79	1.37	1.69	1.77	2.44	7.49	16.39	n/a	33.55
Market Share Total	15.52	6.91	9.56	7.88	7.08	4.03	13.01	19.03	n/a	94.36

Table 6:

Floorspace and benchmark Turnover

	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Waitrose, Rams Walk	1,718	90%	1,546	£11,475	£17.74
Marks & Spencer	586	90%	527	£10,826	£5.71
Tesco, The Causeway	2,146	85%	1,824	£12,432	£22.68
Tesco Express, Charles St.	141	95%	134	£12,432	£1.67
Other Petersfield Shops	400	100%	400	£4,000	£1.60
Total	4,991		4,432	£11,146	49.39
Commitments					
Tesco, The Causeway Extension	1,550	30%	465	£12,432	£5.78
Total	6,541		4,897	£11,268	55.18

Table 7: Convenience Expenditure Shopping Patterns 2016 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2016	15.97	7.11	9.84	8.11	7.28	4.15	13.38	19.59		
Petersfield										
Waitrose, Rams Walk	4.03	2.40	3.04	2.66	1.79	0.99	2.24	1.21	4.59	22.95
Tesco, The Causeway	8.03	3.06	4.17	2.66	2.87	0.46	2.83	0.89	6.24	31.22
Other Petersfield Shops	2.24	0.83	1.22	1.05	0.81	0.19	0.61	0.62	0.84	8.41
	14.30	6.30	8.43	6.37	5.47	1.64	5.68	2.72	11.67	62.58
Other										
Alton	0.20	0.05	0.19	0.00	0.11	0.22	0.00	0.00	n/a	0.76
Bordon	0.06	0.00	0.00	0.04	0.15	1.02	0.99	0.13	n/a	2.39
Liss	0.00	0.11	0.09	0.04	0.08	0.60	3.27	0.00	n/a	4.19
Liphook	0.35	0.06	0.19	0.27	0.07	0.49	2.33	0.12	n/a	3.87
Morrisons, Horndean	0.51	0.17	0.21	0.22	0.21	0.00	0.25	9.64	n/a	11.21
Havant/Waterlooville	0.32	0.22	0.68	0.43	0.34	0.00	0.61	6.38	n/a	9.00
Elsewhere	0.22	0.20	0.06	0.74	0.86	0.19	0.25	0.60	n/a	3.11
	1.66	0.81	1.41	1.74	1.82	2.51	7.71	16.87	n/a	34.53
Market Share Total	15.97	7.11	9.84	8.11	7.28	4.15	13.38	19.59	n/a	97.10

Table 8: Convenience Expenditure Shopping Patterns 2021 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2021	16.67	7.42	10.27	8.47	7.60	4.33	13.97	20.45		
Petersfield										
Waitrose, Rams Walk	4.21	2.51	3.18	2.77	1.87	1.03	2.34	1.26	4.79	23.96
Tesco, The Causeway	8.38	3.20	4.35	2.78	2.99	0.49	2.95	0.93	6.52	32.59
Other Petersfield Shops	2.34	0.87	1.27	1.10	0.84	0.20	0.64	0.65	0.88	8.78
	14.93	6.57	8.80	6.65	5.71	1.71	5.93	2.84	12.19	65.33
Other										
Alton	0.21	0.06	0.19	0.00	0.11	0.22	0.00	0.00	n/a	0.79
Bordon	0.07	0.00	0.00	0.04	0.16	1.06	1.04	0.13	n/a	2.50
Liss	0.00	0.11	0.09	0.04	0.08	0.63	3.42	0.00	n/a	4.37
Liphook	0.37	0.06	0.19	0.28	0.07	0.51	2.44	0.12	n/a	4.04
Morrisons, Horndean	0.53	0.18	0.22	0.23	0.22	0.00	0.26	10.07	n/a	11.70
Havant/Waterlooville	0.34	0.23	0.71	0.45	0.36	0.00	0.64	6.66	n/a	9.39
Elsewhere	0.23	0.21	0.06	0.77	0.90	0.19	0.26	0.63	n/a	3.25
	1.74	0.85	1.47	1.82	1.90	2.62	8.05	17.61	n/a	36.05
Market Share Total	16.67	7.42	10.27	8.47	7.60	4.33	13.97	20.45	n/a	101.38

Table 9: Convenience Expenditure Shopping Patterns 2026 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2026	17.57	7.82	10.82	8.92	8.01	4.56	14.72	21.55		
Petersfield										
Waitrose, Rams Walk	4.44	2.65	3.35	2.92	1.97	1.08	2.47	1.33	5.05	25.25
Tesco, The Causeway	8.83	3.37	4.59	2.93	3.15	0.51	3.11	0.98	6.87	34.34
Other Petersfield Shops	2.47	0.91	1.34	1.16	0.89	0.21	0.67	0.68	0.92	9.25
	15.73	6.93	9.27	7.01	6.01	1.80	6.24	2.99	12.84	68.84
Other										
Alton	0.22	0.06	0.20	0.00	0.12	0.24	0.00	0.00	n/a	0.84
Bordon	0.07	0.00	0.00	0.05	0.17	1.12	1.09	0.14	n/a	2.63
Liss	0.00	0.12	0.09	0.05	0.08	0.66	3.60	0.00	n/a	4.60
Liphook	0.39	0.06	0.20	0.29	0.08	0.54	2.57	0.13	n/a	4.26
Morrisons, Horndean	0.56	0.19	0.24	0.25	0.23	0.00	0.27	10.61	n/a	12.33
Havant/Waterlooville	0.36	0.25	0.75	0.47	0.38	0.00	0.68	7.02	n/a	9.90
Elsewhere	0.25	0.22	0.06	0.81	0.95	0.20	0.27	0.66	n/a	3.42
	1.83	0.89	1.55	1.91	2.00	2.76	8.48	18.55	n/a	37.98
Market Share Total	17.57	7.82	10.82	8.92	8.01	4.56	14.72	21.55	n/a	106.82

Table 10: Convenience Capacity

	2012	2016	2021	2026
Available Expenditure	£60.81	£62.58	£65.33	£68.84
Benchmark Turnover of Existing Facilities	£49.39	£49.39	£49.39	£49.39
Turnover Commitments	£5.78	£5.78	£5.78	£5.78
Surplus Expenditure	£5.63	£7.40	£10.16	£13.66
Turnover Density £ per sq m	£10,000	£10,000	£10,000	£10,000
Floorspace Capacity Sq M Net	563	740	1,016	1,366

Sources: Tables 1 to 9

Appendix 2 Comparison Goods Capacity

Table 1 : Population Projections

Area	2010	2012	2016	2021	2026
GU 31 4 (Petersfield East)	7,496	7,722	7,898	8,053	8,279
GU 32 2 (Petersfield North West)	3,606	3,715	3,799	3,874	3,983
GU 32 3 (Petersfield South West)	4,965	5,115	5,231	5,334	5,483
GU 31 5 (Rural East)	3,525	3,631	3,714	3,787	3,893
GU 32 1 (Rural West)	3,181	3,277	3,351	3,417	3,513
GU 33 6 (West Liss)	1,812	1,867	1,909	1,947	2,001
GU 33 7 (East Liss)	6,376	6,569	6,718	6,850	7,042
PO 8 0 (Horndean)	9,105	9,380	9,593	9,781	10,056
Total	40,066	41,276	42,213	43,042	44,250

Sources:

Experian 2010 Small Area Population

2011 Census of Population figures

Hampshire CC Small Area population growth rates to 2018

ONS 2010 Sub-national population growth rates 2018 to 2026

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

Area	2012	2016	2021	2026
GU 31 4 (Petersfield East)	£3,020	£3,302	£3,823	£4,432
GU 32 2 (Petersfield North West)	£2,879	£3,147	£3,644	£4,224
GU 32 3 (Petersfield South West)	£2,722	£2,976	£3,446	£3,994
GU 31 5 (Rural East)	£3,386	£3,702	£4,286	£4,969
GU 32 1 (Rural West)	£3,561	£3,893	£4,507	£5,225
GU 33 6 (West Liss)	£3,650	£3,990	£4,620	£5,356
GU 33 7 (East Liss)	£3,081	£3,368	£3,900	£4,522
PO 8 0 (Horndean)	£3,189	£3,486	£4,036	£4,679

Experian local estimates for 2010 convenience goods expenditure per capita

Excluding special forms of trading

Experian Business Strategies - recommended forecast growth rates (3.0% per annum)

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

Area	2012	2016	2021	2026
GU 31 4 (Petersfield East)	£23.33	£26.08	£30.79	£36.69
GU 32 2 (Petersfield North West)	£10.69	£11.95	£14.11	£16.82
GU 32 3 (Petersfield South West)	£13.92	£15.57	£18.38	£21.90
GU 31 5 (Rural East)	£12.30	£13.75	£16.23	£19.34
GU 32 1 (Rural West)	£11.67	£13.05	£15.40	£18.36
GU 33 6 (West Liss)	£6.81	£7.62	£8.99	£10.72
GU 33 7 (East Liss)	£20.24	£22.63	£26.72	£31.84
PO 8 0 (Horndean)	£29.91	£33.44	£39.48	£47.05
Total	£128.87	£144.07	£170.10	£202.73

Sources:

Table 1 and Table 2

Table 4: Comparison Shopping Penetration Rates 2012

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow
Petersfield	29.9%	35.5%	30.5%	22.0%	24.9%	28.2%	24.4%	5.7%	35%
Elsewhere	70.1%	64.5%	69.5%	78.0%	75.1%	71.8%	75.6%	94.3%	n/a
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: *Market shares based on household survey May 2012*

Table 5: Comparison Expenditure Shopping Patterns 2012 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2012	23.33	10.69	13.92	12.30	11.67	6.81	20.24	29.91		
Petersfield	6.97	3.80	4.25	2.71	2.91	1.92	4.94	1.72	15.73	44.94
Other	16.36	6.90	9.68	9.59	8.76	4.89	15.30	28.19	n/a	99.66
Market Share Total	23.33	10.69	13.92	12.30	11.67	6.81	20.24	29.91	15.73	144.60

Table 6: Comparison Expenditure Shopping Patterns 2016 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2016	26.08	11.95	15.57	13.75	13.05	7.62	22.63	33.44		
Petersfield	7.79	4.24	4.75	3.03	3.25	2.15	5.52	1.92	17.58	50.24
Other	18.29	7.71	10.82	10.72	9.79	5.47	17.11	31.52	n/a	111.42
Market Share Total	26.08	11.95	15.57	13.75	13.05	7.62	22.63	33.44	17.58	161.66

Table 7: Comparison Expenditure Shopping Patterns 2021 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2021	30.79	14.11	18.38	16.23	15.40	8.99	26.72	39.48		
Petersfield	9.20	5.01	5.61	3.58	3.84	2.54	6.52	2.26	20.76	59.31
Other	21.59	9.10	12.77	12.66	11.56	6.45	20.20	37.22	n/a	131.55
Market Share Total	30.79	14.11	18.38	16.23	15.40	8.99	26.72	39.48	20.76	190.86

Table 8: Comparison Expenditure Shopping Patterns 2026 (£Million)

Centre/Facilities	GU31 4 Petersfield E	GU32 2 Petersfield NW	GU32 3 Petersfield SW	GU31 5 Rural E	GU32 1 Rural W	GU33 6 W Liss	GU33 7 E Liss	PO8 0 Horndean	% Inflow	Total
Expenditure 2026	36.69	16.82	21.90	19.34	18.36	10.72	31.84	47.05		
Petersfield	10.96	5.97	6.68	4.26	4.58	3.03	7.77	2.70	24.74	70.69
Other	25.73	10.85	15.22	15.08	13.78	7.69	24.07	44.35	n/a	156.78
Market Share Total	36.69	16.82	21.90	19.34	18.36	10.72	31.84	47.05	24.74	227.48

Table 9: Comparison Capacity

	2012	2016	2021	2026
Available Expenditure	£44.94	£50.24	£59.31	£70.69
Turnover of Existing Facilities	£44.94	£48.07	£52.30	£56.90
Turnover of Tesco extension commitment	n/a	£9.74	£10.60	£11.53
Surplus Expenditure	n/a	-£7.57	-£3.58	£2.27
Turnover Density £ per sq m	£5,000	£5,349	£5,819	£6,331
Floorspace Capacity Sq M Net	n/a	-1,416	-615	358

Sources: Tables 1 to 9



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