

Appendix [1] Retail impact tables

Table 1a: Population within postcode sectors/zones

Postcode sector	Zone	PCA	Population 2024	Population 2029
PO 7 3/5/8	7/8	A	21,398	21,980
PO 7 6, 7 and PO 8 8	9/10/11	B	32,528	33,282
PO 8 0 & 9	12/13	C	26,007	26,538
PO 7 4/17 6	14/18	D	3,581	3,684

Source: Location Analyst Area Comparison Report; Data Version UK 2019.

Zones reflect those set out in the Town Centres, Retail and Leisure Study (March 2009) prepared by Nathaniel Lichfield and Partners Ltd. We have aggregated these into four zones: A, B, C and D which reflect the Primary Catchment Area (PCA) of Waterloooville town centre.

Appendices B and C to the report summarised the market shares for convenience and comparison goods shopping based on a telephone household and street surveys undertaken by NEMS in 2008. The respective shares are set out in Table 1b below.

Table 1b: Convenience and comparison goods market shares for Waterloooville Town Centre (2008)

Postcode sector	Zone	PCA	Convenience Goods Market Share %[1]	Comparison Goods Market Share %[2]
PO 7 3/5/8	7/8	A	24.5	29.5
PO 7 6, 7 and PO 8 8	9/10/11	B	41.0	39.0
PO 8 0 & 9	12/13	C	17.5	28.5
PO 7 4/17 6	14/18	D	22.0	27.5

Notes:

The market share is the average between the respective zones since the 2008 study identified a total of 21 zones across the study area to cover Havant Borough East and Havant Borough West. Waterloooville lies within Havant Borough West. The retail parks were included within the town centre turnover.

For convenience goods, the study estimated that £3.04m was drawn from the remaining zones with a further allowance of a 10% inflow. This equated to 16.7% of the town’s convenience goods turnover in 2008.

For comparison goods, the town centre also attracted expenditure from outside the PCA. In 2008 from the remaining study area zones, this equated to £13.84m. In addition, the study estimated a further inflow of £10.09. In total this represented 23.7% of its total comparison goods turnover in 2008.

Table 2: Convenience goods expenditure per capita by zone 2024-2029 £'s (2018 prices)

Postcode sector	Zone	PCA	Expenditure per capita 2024	Expenditure per capita 2029
PO 7 3/5/8	7/8	A	2,076	2,023
PO 7 6, 7 and PO 8 8	9/10/11	B	2,053	2,001
PO 8 0 & 9	12/13	C	2,059	2,008
PO 7 4/17 6	14/18	D	2,415	2,354

Source:

- 1. Expenditure per capita by zone in 2019 derived from Area Comparison Report generated using Experian’s Location Analysts software which provides a baseline estimate including SFT.
- 2. All estimates exclude special forms of trading generated by non-store sales in accordance with Experian’s Retail Planner Briefing Note 21 (February 2024)(RPBN 21).
- 3. The RPBN provides expenditure growth rates considering SFT made within traditional stores. These growth rates are set out below:

2025	-0.6
2026	-0.4
2027	-0.2
2028	-0.1
2029	-0.1

Table 3: Comparison goods expenditure per capita by zone 2024-2029 £'s (2018 prices)

Postcode sector	Zone	PCA	Expenditure per capita 2024	Expenditure per capita 2029
PO 7 3/5/8	7/8	A	2,643	2,881
PO 7 6, 7 and PO 8 8	9/10/11	B	2,708	2,952
PO 8 0 & 9	12/13	C	2,835	3,090
PO 7 4/17 6	14/18	D	3,455	3,766

Source:

- 1. Expenditure per capita by zone in 2019 derived from Area Comparison Reports generated using Experian’s Location Analyst software, used under licence by MWA.
- 2. All estimates exclude special forms of trading generated by non-store sales in accordance with Experian’s Retail Planner Briefing Note 21 (February 2022)(RPBN 21).
- 3. The RPBN provides expenditure growth rates considering SFT made within traditional stores. These growth rates are set out below:

2025	+1.2
2026	+2.9
2027	+2.5
2028	+2.2
2029	+2.3

Table 4: Total Convenience goods expenditure by zone 2024-2029 £m’s (2018 prices)

Postcode sector	Zone	PCA	Total convenience goods expenditure 2024 £ms	Total convenience goods expenditure 2029 £ms
PO 7 3/5/8	7/8	A	£44.40	£44.46
PO 7 6, 7 and PO 8 8	9/10/11	B	£66.78	£64.59
PO 8 0 & 9	12/13	C	£53.55	£53.29
PO 7 4/17 6	14/18	D	£8.65	£8.67
Total	-	-	£173.38	£171.01

Source:
From Tables 1a and 2.

Table 5: Total Comparison goods expenditure by zone 2024-2029 £m’s (2018 prices)

Postcode sector	Zone	PCA	Total comparison goods expenditure 2024 £ms	Total comparison goods expenditure 2029 £ms
PO 7 3/5/8	7/8	A	£56.55	£63.32
PO 7 6, 7 and PO 8 8	9/10/11	B	£88.09	£98.25
PO 8 0 & 9	12/13	C	£73.73	£82.00
PO 7 4/17 6	14/18	D	£12.37	£13.87
Total	-	-	£233.39	£257.44

Source:
From Tables 1a and 3.

Table 6: Expenditure per capita - comparison goods sub-category by zone in 2024 and 2029 (%)

Sub-category	Zone A	Zone B	Zone C	Zone D
	%	%	%	%
Clothing/shoes	23.7	23.8	23.5	21.6
Furniture/floor coverings/soft furnishings or household textiles	13.3	13.4	12.9	13.8
Electrical/audio-visual	12.8	12.4	12.1	13.8
Books, jewellery, china, glass and household goods	13.4	12.3	12.8	13.1
Health, personal care, beauty or chemist goods	17.5	15.6	15.9	16.1
Recreational goods including bicycles, toys, sports and camping equipment	11.9	12.1	12.4	12.1
Other	7.4	10.4	10.4	9.5
Total	100	100	100	100

Source: Experian Location Analyst consumer retail expenditure per person by goods type sourced from Area Comparison Reports.

Table 7: Total comparison goods expenditure by zone in 2024 (£ms)

Sub-category	Zone A	Zone B	Zone C	Zone D
	£ms	£ms	£ms	£ms
Clothing/shoes	£13.40	£20.97	£17.33	£2.67
Furniture/floor coverings/soft furnishings or household textiles	£7.52	£11.80	£9.51	£1.71
Electrical/audio-visual	£7.24	£10.92	£8.92	£1.71
Books, jewellery, china, glass and household goods	£7.58	£10.84	£9.44	£1.62
Health, personal care, beauty or chemist goods	£9.90	£13.74	£11.72	£1.99
Recreational goods including bicycles, toys, sports and camping equipment	£6.73	£10.66	£9.14	£1.50
Other	£4.18	£9.16	£7.67	£1.18
Total	£56.55	£88.09	£73.73	£12.37

Table 8: Total comparison goods expenditure by zone in 2029 (£ms)

Sub-category	Zone A	Zone B	Zone C	Zone D
	£ms	£ms	£ms	£ms
Clothing/shoes	£15.01	£23.38	£19.27	£3.00
Furniture/floor coverings/soft furnishings or household textiles	£8.42	£13.17	£10.58	£1.91
Electrical/audio-visual	£8.10	£12.18	£9.92	£1.91
Books, jewellery, china, glass and household goods	£8.48	£12.08	£10.50	£1.82
Health, personal care, beauty or chemist goods	£11.08	£15.33	£13.04	£2.23
Recreational goods including bicycles, toys, sports and camping equipment	£7.54	£11.89	£10.17	£1.68
Other	£4.69	£10.22	£8.53	£1.32
Total	£63.32	£98.25	£82.00	£13.87

Table 9a: Zone A – Comparison Goods expenditure attracted to Waterloooville Town Centre 2024-2029 (£ms)

Zone A:

Sub-category	Zone A 2024	Zone A 2029	% to Waterloooville Town Centre	Total attracted from Zone A 2024	Total attracted from Zone A 2029
	£ms	£ms	%	£ms	£ms
Clothing/shoes	£13.40	£15.01	30.0	£4.02	£4.50
Furniture/floor coverings/soft furnishings or household textiles	£7.52	£8.42	44.7	£3.36	£3.76
Electrical/audio-visual	£7.24	£8.10	29.3	£2.12	£2.37
Books, jewellery, china, glass and household goods	£7.58	£8.48	45.5	£3.45	£3.86
Health, personal care, beauty or chemist goods	£9.90	£11.08	68.4	£6.77	£7.58
Recreational goods including bicycles, toys, sports and camping equipment	£6.73	£7.54	25.0	£1.68	£1.88
Other			31.9	£0.00	£0.00
Total	£52.37	£58.63	-	£21.40	£23.97

Note: The town centre turnover includes the Wellington Retail Park, Asda and Sainsbury’s superstores.

Market share in 2024 based on telephone household survey (2020) prepared by NEMS.

Market share assumed to remain static to 2029.

Table 9b: Zone B – Comparison Goods Expenditure attracted to Waterloooville Town Centre 2024-2029 (£ms)

Zone B:

Sub-category	Zone B 2024	Zone B 2029	% to Waterloooville Town Centre	Total attracted from Zone B 2024	Total attracted from Zone B 2029
	£ms	£ms	%	£ms	£ms
Clothing/shoes	£20.97	£23.38	33.8	£7.09	£7.90
Furniture/floor coverings/soft furnishings or household textiles	£11.80	£13.17	60.4	£7.13	£7.95
Electrical/audio-visual	£10.92	£12.18	44.7	£4.88	£5.45
Books, jewellery, china, glass and household goods	£10.84	£12.08	56.1	£6.08	£6.78
Health, personal care, beauty or chemist goods	£13.74	£15.33	65.6	£9.01	£10.05
Recreational goods including bicycles, toys, sports and camping equipment	£10.66	£11.89	46.6	£4.97	£5.54
Other			64.2	£0.00	£0.00
Total	£78.93	£88.03	-	£39.16	£43.68

Note: The town centre turnover includes the Wellington Retail Park, Asda and Sainsbury’s superstores.

Market share in 2024 based on telephone household survey (2020) prepared by NEMS.

Market share assumed to remain static to 2029.

Table 9c: Zone C – Comparison Goods Expenditure attracted to Waterlooville Town Centre 2024-2029 (£ms)

Zone C:

Sub-category	Zone C 2024	Zone C 2029	% to Waterlooville Town Centre	Total attracted from Zone C 2024	Total attracted from Zone C 2029
	£ms	£ms	%	£ms	£ms
Clothing/shoes	£17.33	£19.27	33.4	£5.79	£6.44
Furniture/floor coverings/soft furnishings or household textiles	£9.51	£10.58	48.1	£4.57	£5.09
Electrical/audio-visual	£8.92	£9.92	30.8	£2.75	£3.06
Books, jewellery, china, glass and household goods	£9.44	£10.50	37.2	£3.51	£3.90
Health, personal care, beauty or chemist goods	£11.72	£13.04	46.0	£5.39	£6.00
Recreational goods including bicycles, toys, sports and camping equipment	£9.14	£10.17	43.5	£3.98	£4.42
Other			13.8	£0.00	£0.00
Total	£66.06	£73.47	-	£25.99	£28.91

Note: The town centre turnover includes the Wellington Retail Park, Asda and Sainsbury’s superstores.

Market share in 2024 based on telephone household survey (2020) prepared by NEMS.

Market share assumed to remain static to 2029.

Table 9d: Zone D – Comparison Goods Expenditure attracted to Waterlooville Town Centre 2024-2029 (£ms)

Zone D:

Sub-category	Zone D 2024	Zone D 2029	% to Waterlooville Town Centre	Total attracted from Zone D 2024	Total attracted from Zone D 2029
	£ms	£ms	%	£ms	£ms
Clothing/shoes	£2.67	£3.00	6.7	£0.18	£0.20
Furniture/floor coverings/soft furnishings or household textiles	£1.71	£1.91	20.1	£0.34	£0.38
Electrical/audio-visual	£1.71	£1.91	7.7	£0.13	£0.15
Books, jewellery, china, glass and household goods	£1.62	£1.82	0.0	£0.00	£0.00
Health, personal care, beauty or chemist goods	£1.99	£2.23	23.8	£0.47	£0.53
Recreational goods including bicycles, toys, sports and camping equipment	£1.50	£1.68	20.0	£0.30	£0.34
Other			10.0	£0.00	£0.00
Total	£11.19	£12.55	-	£1.43	£1.60

Note: The town centre turnover includes the Wellington Retail Park, Asda and Sainsbury’s superstores.

Market share in 2024 based on telephone household survey (2020) prepared by NEMS.

Market share assumed to remain static to 2029.

Table 10: Waterloooville Town Centre - comparison goods turnover generated by residents in Zones A-D 2024-2029 (£ms)

	Zone A	Zone B	Zone C	Zone D	Total Residents
2024	£21.40	£39.16	£25.99	£1.43	£87.98
2029	£23.97	£43.68	£28.91	£1.60	£98.16

Table 11: Comparison goods expenditure retention: Waterlooville Town Centre 2024-2029 (£ms) (2018 prices)

	Total comparison goods expenditure within Zones A-D 2024	Total comparison goods expenditure within Zone A-D 2029	Total expenditure retained by Waterlooville Town Centre 2024	Retention rate	Total expenditure retained by Waterlooville Town Centre 2029	Retention rate
	£ms	£ms	£ms	%	£ms	%
Zones A-D	230.74	257.44	87.98	38.1	98.16	38.1

Table 12: Comparison goods turnover of WaterlooVille Town Centre 2024-2029 (£ms)

Year	Total from Zones A-D (£ms)	Inflow from other study area zones (£ms)	Total comparison goods from all study zones (£ms)	Inflow from outside the borough 10%	Total comparison goods turnover (£ms)
2024	87.98	13.44	101.42	10.14	111.56
2029	98.15	14.82	112.97	11.30	124.27

Note:

Waterlooville Town Centre including the retail park also draws comparison expenditure from the other zones in the study area in the TCRLS. These %'s are as follows:

Zone 1	4%
Zone 2	5%
Zone 3	7%
Zone 4	7%
Zone 5	7%
Zone 6	2%
Zone 15	3%
Zone 16	2%
Zone 17	1%
Zone 19	2%
Zone 20	5%
Zone 21	1&
Zone 22	5%

Table 13: Comparison goods turnover of proposed development - 2029 (£ms)

Gross floorspace (sq.m.)	Net floorspace (sq.m.)	Sales density £'s sq.m.	Total turnover (£ms) 2029
4,000	3,200	£3,500	£11.2

Table 14: Trade draw and impact – 2029 (£ms; %)

Centre/facility	Comparison Goods Turnover 2024 (£ms)	Comparison Goods Turnover 2029 (£ms)	Trade draw (%)	Trade draw (£ms)	Impact (%)
Havant West					
Waterlooville Town Centre	111.56	124.27	25	2.8	2.3
Havant East	N.C	N.C	10	1.12	N.C.
Claw-back (from expenditure lost from Zones A-D per annum)	144.40	159.30	50	5.6	3.5
Outside the borough	-	-	15	1.68	N.C.
Total	-	-	100	11.2	-

