

Appendix [4] Retail impact tables

Table 1: Estimated comparison goods turnover 2021 (£ms)(2007 prices)

Gross floor area sq.m.	Net (sales) area sq.m.	Assumed sales density	Turnover £ms (2021)
4,000	2,800	5,375	15.05

Notes:

Experian estimate that in 2021 all forms of comparison goods floorspace will trade at an average of £5,307 sq.m. at 2012 prices (Figure 4b, Experian Planner Briefing Note 14). Converting to 2007 prices indicates a sales density of £5,375 sq.m.

Table 2: Comparison goods expenditure capacity: West

Year	Available expenditure (£ms)	Turnover of existing floorspace (£ms)	Turnover of commitments (£ms)	Turnover of commitments and Sainsbury's Waterlooville (£ms)	Other developments	Surplus expenditure (£ms)
2016	144.65	118.20	4.30	15.26	£1.50	9.69
2021	173.74	127.33	4.64	15.60	£1.53	29.28
2026	209.34	137.17	4.57	15.95	£1.58	55.06

Notes:

2007 prices

Available expenditure, turnover of existing floorspace and turnover of commitments 2016 and 2021: Table 9c, Appendix C of TCRLS 2009.

Comparison goods turnover of Sainsbury's Waterlooville based on Sainsbury's retail study: £10.96m.

West includes Waterlooville Town Centre, the retail parks and Cowplain.

Other developments include (Source Council's AMP, December 2017):

18 the Westbrook Centre: 256 sq.m. (£0.64m)

B&Q Purbrook Way: 328 sq.m. (£0.43m)

Wellington Retail Park: 173 sq.m. (£0.43m)

**Table 3: Comparison goods turnover of centres in Havant West assuming constant market share
(£ms)(2007 prices)**

Centre		Waterlooville	Cowplain DC	Commitments & Sainsbury's Waterlooville	Total (£ms)
Market share of comparison goods expenditure attracted to West Havant (2008)		96%	4%	-	-
Comparison goods turnover: West 2016 (£ms)		138.86	5.79	-	144.65
Comparison goods turnover: West 2021 (£ms)		150.3	6.31	£17.13	173.74

Notes:

Table 9c of Appendix C to the TCRLS (2009) indicates that in 2008 Waterloooville and Cowplain District Centre accommodated £104.92m of comparison goods expenditure which was attracted to Havant Borough West.

Table 9c of Appendix C assumes that the existing comparison goods floorspace improves its efficiency over the period to 2016, 2021 and 2026. This then provides a basis for accommodating new floorspace based the the surplus arising from that accommodated within existing centres and the expenditure growth. In the case of Havant Borough West this equates to a surplus of £22.15m in 2016 increasing to £41.78m by 2021.

However, the only new comparison goods retail floorspace in Havant Borough West has been the Sainsbury's store at Waterloooville. This is expected to achieve a design year turnover of £10.96m and including other commitments will turnover at £15.6m. In the absence of any additional space, the residual expenditure (all other things being equal) will be attracted to the existing centres. Consequently Waterloooville Town Centre and Cowplain have been adjusted accordingly.

Table 4: Comparison goods trade draw and retail impact 2021 (£ms)(2007 prices)

Centre/facility	Turnover 2016 (£ms)	Turnover 2021 (£ms)	Trade draw (%)	Post- impact turnover (£ms)	Impact (%)
Havant West					
Waterlooville T.C. incl. retail parks	138.86	150.30	25	3.76	2.5
Cowplain	5.79	6.31	1	0.15	2.4
Sainsbury's	-	-	9	1.35	
Havant East	230.39		25	3.76	
Outside the borough	-	-	40	6.02	
Total			100	15.05	