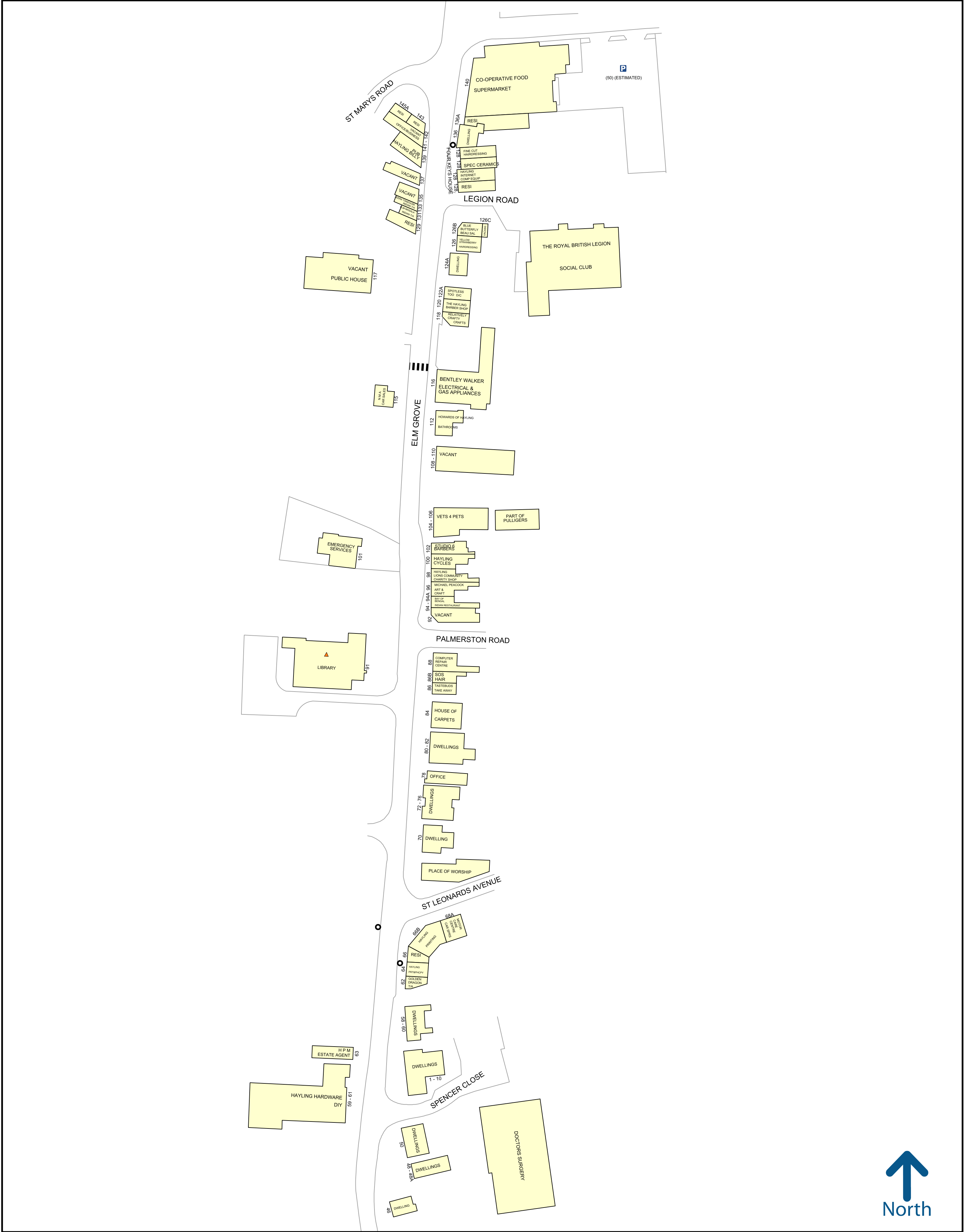
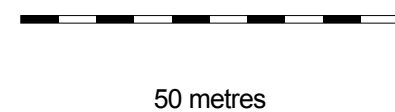




Experian Goad Plan Created: 12/01/2017
Created By: Turley Associates Ltd

50 metres



Appendix 3: Economic Tables

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 1: POPULATION AND CONVENIENCE GOODS EXPENDITURE WITHIN CATCHMENT AREA

ZONE		Hayling Island
2017		
Population		17,903
Expenditure per Head (£)		2,069
Total Expenditure (£m)		37.03
2022		
Population		18,285
Expenditure per Head (£)		2,121
Total Expenditure (£m)		38.78
Population Growth 2017-2022		382
Expenditure Growth 2017-2022 (£m)		1.75

- NOTES:
1. The catchment area is based on postcode district PO11 - Hayling Island (Zone 8 from the Portsmouth Retail Study 2015)
 2. Population and expenditure per capita derived from Pitney Bowes GeoInsight Report Data (2015 based estimates)
 3. Expenditure per capita identified to grow at ultra long term growth rate of +0.5% p/a (as identified by Pitney Bowes Retail Expenditure Guide, November 2016)

TABLE 2: POPULATION AND COMPARISON GOODS EXPENDITURE WITHIN CATCHMENT AREA

ZONE		Hayling Island
2017		
Population		17,903
Expenditure per Head (£)		3,087
Total Expenditure (£m)		55.26
2022		
Population		18,285
Expenditure per Head (£)		3,958
Total Expenditure (£m)		72.37
Population Growth 2017-2022		18,285
Expenditure Growth 2017-2022 (£m)		17.12

- NOTES:
1. The catchment area is based on postcode district PO11 - Hayling Island (Zone 8 from the Portsmouth Retail Study 2015)
 2. Population and expenditure per capita derived from Pitney Bowes GeoInsight Report Data (2015 based estimates)
 3. Expenditure per capita identified to grow at ultra long term growth rate of +5.1% p/a (as identified by Pitney Bowes Retail Expenditure Guide, November 2016)
 4. SFT deducted from per capita figures (19.7 % deduction based on Pitney Bowes Retail Expenditure Guide, November 2016)

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 3: POPULATION AND CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA

ZONE	Study Area															
	1	2	4	5	6	7	8	9	10	11	12	13	15	16	17	Total
2017																
Population	40,735	44,930	17,992	23,623	77,046	59,949	17,903	81,131	49,406	40,297	42,804	41,016	61,119	61,439	48,694	708,084
Expenditure per Head (£)	2,125	2,164	2,170	2,256	2,143	2,002	2,069	1,506	1,436	1,410	1,367	2,200	2,129	1,975	1,980	
Total Expenditure (£m)	86.58	97.25	39.04	53.29	165.07	120.02	37.03	122.17	70.93	56.84	58.51	90.23	130.14	121.32	96.42	1,344.85
2022																
Population	41,785	47,338	18,638	23,996	80,190	61,732	18,285	83,640	50,498	41,910	44,319	41,986	64,383	63,528	49,094	731,322
Expenditure per Head (£)	2,179	2,219	2,225	2,313	2,197	2,053	2,121	1,544	1,472	1,446	1,402	2,255	2,183	2,025	2,030	
Total Expenditure (£m)	91.06	105.04	41.46	55.49	176.15	126.72	38.78	129.13	74.33	60.60	62.11	94.70	140.56	128.61	99.67	1,424.41
Population Growth 2017-2022	1,050	2,408	646	373	3,144	1,783	382	2,509	1,092	1,613	1,515	970	3,264	2,089	400	23,238
Expenditure Growth 2017-2022 (£m)	4.47	7.80	2.42	2.21	11.07	6.69	1.75	6.96	3.40	3.77	3.60	4.47	10.41	7.29	3.25	79.56

- NOTES:
- 1. The Study Area is based on the zones from the Portsmouth Retail Study 2015.
 - 2. Population and expenditure per capita derived from Pitney Bowes Geolnsight Report Data (2015 based estimates) for each zone.
 - 3. Expenditure per capita identified to grow at ultra long term growth rate of +0.5% p/a (as identified by Pitney Bowes Retail Expenditure Guide, November 2016).

TABLE 4: POPULATION AND COMPARISON GOODS EXPENDITURE WITHIN STUDY AREA

ZONE	Study Area															
	1	2	4	5	6	7	8	9	10	11	12	13	15	16	17	Total
2017																
Population	40,735	44,930	17,992	23,623	77,046	59,949	17,903	81,131	49,406	40,297	42,804	41,016	61,119	61,439	48,694	708,084
Expenditure per Head (£)	3,125	3,307	3,365	3,495	3,207	2,832	3,087	2,373	2,005	2,012	1,970	3,325	3,304	2,912	2,864	
Total Expenditure (£m)	127.28	148.60	60.53	82.57	247.07	169.78	55.26	192.50	99.07	81.06	84.34	136.38	201.94	178.91	139.48	2,004.78
2022																
Population	41,785	47,338	18,638	23,996	80,190	61,732	18,285	83,640	50,498	41,910	44,319	41,986	64,383	63,528	49,094	731,322
Expenditure per Head (£)	4,007	4,241	4,315	4,482	4,112	3,632	3,958	3,043	2,572	2,580	2,527	4,264	4,237	3,734	3,673	
Total Expenditure (£m)	167.43	200.78	80.42	107.55	329.76	224.20	72.37	254.50	129.86	108.11	111.98	179.02	272.80	237.24	180.33	2,656.34
Population Growth 2017-2022	1,050	2,408	646	373	3,144	1,783	382	2,509	1,092	1,613	1,515	970	3,264	2,089	400	23,238
Expenditure Growth 2017-2022 (£m)	40.15	52.17	19.88	24.99	82.69	54.42	17.12	61.99	30.78	27.05	27.64	42.65	70.85	58.32	40.85	651.56

- NOTES:
- 1. The Study Area is based on the zones from the Portsmouth Retail Study 2015.
 - 2. Population and expenditure per capita derived from Pitney Bowes Geolnsight Report Data (2015 based estimates) for each zone.
 - 3. Expenditure per capita identified to grow at ultra long term growth rate of +5.1% p/a (as identified by Pitney Bowes Retail Expenditure Guide, November 2016).
 - 4. SFT deducted from per capita figures (19.7% deduction based on Pitney Bowes Retail Expenditure Guide, November 2016).

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 5: MARKET SHARES OF EXISTING CONVENIENCE GOODS CENTRES AND LOCATIONS

Destination	Study Area														
	Zone 1	Zone 2	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 15	Zone 16	Zone 17
<u>Havant Borough Council</u>															
Hayling Island	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	20.42%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Havant Town Centre															
Waitrose, North Street, Havant	0.00%	0.00%	0.00%	0.00%	0.27%	8.80%	4.68%	0.00%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%
Leigh Park District Centre															
Iceland, Greywell Road, Leigh Park	0.00%	0.00%	0.00%	0.00%	0.00%	1.26%	0.00%	0.00%	0.00%	0.00%	0.00%	0.47%	0.00%	0.00%	0.00%
Waterlooville Town Centre															
Waitrose, Dukes Walk, Waterlooville	0.00%	0.00%	0.00%	0.00%	14.38%	0.00%	0.00%	0.00%	0.00%	0.00%	1.99%	0.00%	0.00%	0.52%	0.00%
Edge/Out of Centre Stores															
Tesco Extra, Solent Road, Havant	0.00%	0.69%	12.73%	1.27%	0.84%	24.62%	29.26%	0.00%	0.63%	0.87%	2.24%	0.00%	0.30%	0.00%	0.66%
Asda, Larchwood Avenue, Bedhampton	0.83%	0.00%	1.76%	5.10%	11.35%	12.03%	8.78%	0.00%	2.69%	5.20%	12.94%	2.07%	0.55%	0.00%	0.00%
Aldi, Central Retail Park, Park Way, Havant	0.83%	0.00%	4.61%	0.00%	1.78%	9.59%	4.68%	3.15%	0.00%	0.00%	1.24%	0.80%	0.00%	0.00%	0.00%
Asda, Portland Road, Waterlooville	0.00%	0.00%	1.76%	0.00%	19.71%	2.31%	0.00%	0.00%	1.25%	0.54%	0.00%	1.27%	0.00%	0.00%	0.00%
Other Stores Havant Borough Council	0.00%	0.00%	9.65%	0.00%	16.16%	23.11%	0.00%	0.00%	0.00%	0.00%	0.49%	0.00%	0.00%	0.00%	3.33%
<u>Portsmouth City Council</u>															
Sainsbury's Superstore, Fitzherbert Road, Farlington	0.83%	0.00%	1.76%	0.00%	1.26%	2.31%	2.92%	2.67%	4.38%	7.68%	23.82%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Havant Road, Farlington	0.00%	0.00%	0.00%	0.00%	0.00%	0.36%	7.60%	0.00%	0.00%	0.00%	0.99%	0.00%	0.00%	0.33%	0.00%
Asda, Fratton District Centre, Portsmouth	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.51%	10.67%	23.14%	5.08%	0.99%	0.00%	0.00%	0.00%	0.00%
Morrisons, Victory Retail Park, Flathouse Road, Portsmouth	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.76%	1.73%	1.66%	4.22%	0.49%	1.27%	0.00%	0.00%	0.00%
Sainsbury's Local, Guildhall Walk, Portsmouth City Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.17%	2.36%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Elm Grove, Southsea, Portsmouth	0.83%	0.00%	0.00%	0.00%	0.00%	0.00%	2.92%	1.18%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Highland Road, Southsea	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.17%	3.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other stores	95.83%	95.85%	58.97%	87.25%	28.81%	12.43%	9.36%	69.32%	60.64%	72.95%	49.59%	92.05%	92.60%	97.09%	92.27%
Internet	0.83%	3.46%	8.78%	6.37%	5.45%	3.17%	1.76%	5.91%	5.63%	3.47%	4.48%	2.07%	6.55%	2.06%	3.74%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

NOTES

1. Market shares derived from results of Portsmouth Household Survey (June 2014)

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 6: TURNOVERS OF EXISTING CONVENIENCE GOODS CENTRES AND LOCATIONS - 2017 (£M)

Destination	Study Area																	Inflow %	Grand Total
	Zone 1	Zone 2	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 15	Zone 16	Zone 17	Total			
<u>Havant Borough Council</u>																			
Hayling Island	0.00	0.00	0.00	0.00	0.00	0.00	7.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.56	15%	8.90	
Havant Town Centre																			
Waitrose, North Street, Havant	0.00	0.00	0.00	0.00	0.45	10.57	1.73	0.00	0.00	0.00	0.44	0.00	0.00	0.00	0.00	13.18	15%	15.51	
Leigh Park District Centre																			
Iceland, Greywell Road, Leigh Park	0.00	0.00	0.00	0.00	0.00	1.51	0.00	0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.00	1.93	5%	2.03	
Waterlooville Town Centre																			
Waitrose, Dukes Walk, Waterlooville	0.00	0.00	0.00	0.00	23.74	0.00	0.00	0.00	0.00	0.00	1.16	0.00	0.00	0.63	0.00	25.53	10%	28.36	
Edge/Out of Centre Stores																			
Tesco Extra, Solent Road, Havant	0.00	0.67	4.97	0.68	1.38	29.55	10.84	0.00	0.44	0.49	1.31	0.00	0.39	0.00	0.63	51.36	5%	54.07	
Asda, Larchwood Avenue, Bedhampton	0.72	0.00	0.69	2.72	18.73	14.44	3.25	0.00	1.91	2.96	7.57	1.87	0.71	0.00	0.00	55.56	15%	65.36	
Aldi, Central Retail Park, Park Way, Havant	0.72	0.00	1.80	0.00	2.93	11.51	1.73	3.85	0.00	0.00	0.73	0.72	0.00	0.00	0.00	23.99	5%	25.25	
Asda, Portland Road, Waterlooville	0.00	0.00	0.69	0.00	32.53	2.78	0.00	0.00	0.89	0.31	0.00	1.15	0.00	0.00	0.00	38.34	5%	40.35	
Other Stores Havant Borough Council	0.00	0.00	3.77	0.00	26.67	27.74	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	3.21	61.68	5%	64.92	
<u>Portsmouth City Council</u>																			
Sainsbury's Superstore, Fitzherbert Road, Farlington	0.72	0.00	0.69	0.00	2.08	2.78	1.08	3.26	3.10	4.37	13.94	0.00	0.00	0.00	0.00	32.01	-	-	
Tesco Express, Havant Road, Farlington	0.00	0.00	0.00	0.00	0.00	0.44	2.82	0.00	0.00	0.00	0.58	0.00	0.00	0.40	0.00	4.23	-	-	
Asda, Fratton District Centre, Portsmouth	0.00	0.00	0.00	0.00	0.00	0.00	1.30	13.03	16.41	2.89	0.58	0.00	0.00	0.00	0.00	34.21	-	-	
Morrisons, Victory Retail Park, Flathouse Road, Portsmouth	0.00	0.00	0.00	0.00	0.00	0.00	0.65	2.11	1.18	2.40	0.29	1.15	0.00	0.00	0.00	7.77	-	-	
Sainsbury's Local, Guildhall Walk, Portsmouth City Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.43	2.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.32	-	-	
Co-op, Elm Grove, Southsea, Portsmouth	0.72	0.00	0.00	0.00	0.00	0.00	1.08	1.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.25	-	-	
Co-op, Highland Road, Southsea	0.00	0.00	0.00	0.00	0.00	0.00	0.43	3.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.11	-	-	
Other stores	82.97	93.21	23.02	46.49	47.56	14.92	3.47	84.69	43.01	41.46	29.02	83.06	120.51	117.79	88.97	920.15	-	-	
Internet	0.72	3.36	3.43	3.40	9.00	3.81	0.65	7.22	3.99	1.97	2.62	1.87	8.53	2.50	3.60	56.67	-	-	
	86.58	97.25	39.04	53.29	165.07	120.02	37.03	122.17	70.93	56.84	58.51	90.23	130.14	121.32	96.42	1,344.85	-	-	

NOTES

 1. Turnover = Market shares (Table 5) x available expenditure at 2022 (Table 3)

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 7: TURNOVERS OF EXISTING CONVENIENCE GOODS CENTRES AND LOCATIONS - 2022 (£M)

Destination	Study Area																Inflow %	Grand Total
	Zone 1	Zone 2	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 15	Zone 16	Zone 17	Total		
<u>Havant Borough Council</u>																		
Hayling Island	0.00	0.00	0.00	0.00	0.00	0.00	7.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.92	15%	9.32
Havant Town Centre																		
Waitrose, North Street, Havant	0.00	0.00	0.00	0.00	0.48	11.16	1.81	0.00	0.00	0.00	0.46	0.00	0.00	0.00	0.00	13.91	15%	16.37
Leigh Park District Centre																		
Iceland, Greywell Road, Leigh Park	0.00	0.00	0.00	0.00	0.00	1.59	0.00	0.00	0.00	0.00	0.00	0.44	0.00	0.00	0.00	2.04	5%	2.14
Waterlooville Town Centre																		
Waitrose, Dukes Walk, Waterlooville	0.00	0.00	0.00	0.00	25.33	0.00	0.00	0.00	0.00	0.00	1.23	0.00	0.00	0.66	0.00	27.23	10%	30.25
Edge/Out of Centre Stores																		
Tesco Extra, Solent Road, Havant	0.00	0.73	5.28	0.71	1.48	31.20	11.35	0.00	0.46	0.53	1.39	0.00	0.42	0.00	0.65	54.19	5%	57.05
Asda, Larchwood Avenue, Bedhampton	0.76	0.00	0.73	2.83	19.99	15.24	3.41	0.00	2.00	3.15	8.04	1.96	0.77	0.00	0.00	58.87	15%	69.26
Aldi, Central Retail Park, Park Way, Havant	0.76	0.00	1.91	0.00	3.13	12.15	1.81	4.07	0.00	0.00	0.77	0.76	0.00	0.00	0.00	25.36	5%	26.69
Asda, Portland Road, Waterlooville	0.00	0.00	0.73	0.00	34.72	2.93	0.00	0.00	0.93	0.33	0.00	1.20	0.00	0.00	0.00	40.84	5%	42.98
Other Stores Havant Borough Council	0.00	0.00	4.00	0.00	28.46	29.29	0.00	0.00	0.00	0.00	0.31	0.00	0.00	0.00	3.32	65.37	5%	68.81
<u>Portsmouth City Council</u>																		
Sainsbury's Superstore, Fitzherbert Road, Farlington	0.76	0.00	0.73	0.00	2.22	2.93	1.13	3.45	3.25	4.66	14.79	0.00	0.00	0.00	0.00	33.92	-	-
Tesco Express, Havant Road, Farlington	0.00	0.00	0.00	0.00	0.00	0.46	2.95	0.00	0.00	0.00	0.61	0.00	0.00	0.42	0.00	4.45	-	-
Asda, Fratton District Centre, Portsmouth	0.00	0.00	0.00	0.00	0.00	0.00	1.36	13.78	17.20	3.08	0.61	0.00	0.00	0.00	0.00	36.03	-	-
Morrisons, Victory Retail Park, Flathouse Road, Portsmouth	0.00	0.00	0.00	0.00	0.00	0.00	0.68	2.23	1.23	2.55	0.31	1.20	0.00	0.00	0.00	8.21	-	-
Sainsbury's Local, Guildhall Walk, Portsmouth City Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.45	3.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.50	-	-
Co-op, Elm Grove, Southsea, Portsmouth	0.76	0.00	0.00	0.00	0.00	0.00	1.13	1.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.42	-	-
Co-op, Highland Road, Southsea	0.00	0.00	0.00	0.00	0.00	0.00	0.45	3.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.34	-	-
Other stores	87.26	100.69	24.45	48.42	50.75	15.75	3.63	89.51	45.07	44.21	30.80	87.17	130.15	124.87	91.96	974.70	-	-
Internet	0.76	3.63	3.64	3.54	9.60	4.02	0.68	7.63	4.18	2.10	2.78	1.96	9.21	2.65	3.72	60.12	-	-
	91.06	105.04	41.46	55.49	176.15	126.72	38.78	129.13	74.33	60.60	62.11	94.70	140.56	128.61	99.67	1,424.41	-	-

NOTES

1. Turnover = Market shares (Table 5) x available expenditure at 2022 (Table 3)

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 8: EXISTING CONVENIENCE RETAILERS ON HAYLING ISLAND

Store	Floorspace (sq m) Net	Sales Area (sq m) Convenience	Proportion of Hayling Island Convenience Floorspace (%)	Proportion of Hayling Island turnover from Household Survey (£m) - 2022
Mengham/Gable Head District Centre				
Co-op, Elm Grove	834	709	50%	4.68
Sainsbury's Local, Mengham Road	219	193	14%	1.27
Edge/Out of Centre				
Co-op, Selsmore Road	365	310	22%	2.05
Tesco Express, Station Road	224	199	14%	1.32
Total	1,642	1,411	100%	9.32

NOTES:

- 1. Floorspaces derived from StorePoint (2016)
- 2. Floorspace splits derived from Verdict and Mintel (2015).
- 3. Hayling Island turnover (£9.32) derived from Table 7.

AT 2015 PRICES

TABLE 9: ESTIMATED TURNOVER OF PROPOSED FOODSTORE

Proposed Development	Floorspace (sq m)	Sales Area (sq m)		Sales Density (£'s per sq m)		Benchmark Turnover (£m) - 2017		Benchmark Turnover (£m) - 2022		Turnover from Study Area (£m) - 2022	
	Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
Lidl store	1,340	1,072	268	3,638	3,638	3.90	0.97	3.98	1.07	3.78	1.01
Total	1,340	1,072	268	-	-	3.90	0.97	3.98	1.07	3.78	1.01

- NOTES:
- 1. Convenience/comparison sales area based on a 80%/20% split
 - 2. Sales density of proposed store derived from Verdict 2015 and verified by Lidl
 - 3. Floorspace efficiency at +0.4% per annum for convenience goods and +1.8% per annum for comparison goods applied between 2017 and 2022
 - 4. 95% of store turnover derived from Study Area, based on Turley assumptions

AT 2015 PRICES

SITE AT FORMER ROOKERY SITE, HAYLING ISLAND

TABLE 10: TURNOVERS OF EXISTING CONVENIENCE GOODS CENTRES AND LOCATIONS - 2022

Destination	Total Turnover 2022 (£m)	Diversion to Proposal (%)	(£m)	Resultant Turnover (£m)	Impact (%)
<u>Havant Borough Council</u>					
Hayling Island - Mengham/Gable Head District Centre					
Co-op, Elm Grove	4.68	5%	0.19	4.49	-4.0%
Sainsbury's Local, Mengham Road	1.27	2%	0.08	1.20	-5.9%
Sub-total	5.95	7%	0.26	5.69	-4.4%
Hayling Island - Edge/Out of Centre					
Co-op, Selsmore Road	2.05	2%	0.08	1.97	-3.7%
Tesco Express, Station Road	1.32	1%	0.04	1.28	-2.9%
Havant Town Centre					
Waitrose, North Street, Havant	16.37	5%	0.19	16.18	-1.2%
Leigh Park District Centre					
Iceland, Greywell Road, Leigh Park	2.14	1%	0.04	2.10	-1.8%
Waterlooville Town Centre					
Waitrose, Dukes Walk, Waterlooville	30.25	0%	0.00	30.25	0.0%
Edge/Out of Centre Stores					
Tesco Extra, Solent Road, Havant	57.05	30%	1.13	55.91	-2.0%
Asda, Larchwood Avenue, Bedhampton	69.26	10%	0.38	68.88	-0.5%
Aldi, Central Retail Park, Park Way, Havant	26.69	10%	0.38	26.32	-1.4%
Asda, Portland Road, Waterlooville	42.98	0%	0.00	42.98	0.0%
Other Stores Havant Borough Council	68.81	5%	0.19	68.62	-0.3%
<u>Portsmouth City Council</u>					
Sainsbury's Superstore, Fitzherbert Road, Farlington	33.92	4%	0.15	33.77	-0.4%
Tesco Express, Havant Road, Farlington	4.45	4%	0.15	4.30	-3.4%
Asda, Fratton District Centre, Portsmouth	36.03	3%	0.11	35.92	-0.3%
Morrisons, Victory Retail Park, Flathouse Road, Portsmouth	8.21	2%	0.08	8.13	-0.9%
Sainsbury's Local, Guildhall Walk, Portsmouth City Centre	3.50	1%	0.04	3.47	-1.1%
Co-op, Elm Grove, Southsea, Portsmouth	3.42	2%	0.08	3.34	-2.2%
Co-op, Highland Road, Southsea	4.34	1%	0.04	4.30	-0.9%
Other stores	974.70	10%	0.38	974.32	0.0%
Internet	60.12	2%	0.08	60.05	-0.1%
	1,451.56	100%	3.78	1,447.78	-

- NOTES
1. Turnovers at 2022 derived from Tables 7 & 8
 2. Anticipated trade draw of the proposal based on geographical location of existing provision and like-for-like offer
 3. Turnover of the proposed development derived from Table 9
 4. Resultant turnover = study derived turnover minus 'diversion to proposal'
 5. Impact based on the proportional change in turnover expressed as a percentage

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TABLE 11: SENSITIVITY TEST - TURNOVER OF PROPOSED FOODSTORE

Proposed Development	Floorspace (sq m)	Sales Area (sq m)		Sales Density (£'s per sq m)		Benchmark Turnover (£m) - 2017		Benchmark Turnover (£m) - 2022		Turnover from Study Area (£m) - 2022	
	Net	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
Lidl store	1,340	1,072	268	4,500	4,500	4.82	1.21	4.92	1.32	4.68	1.25
Total	1,340	1,072	268	-	-	4.82	1.21	4.92	1.32	4.68	1.25

- NOTES:
- 1. Convenience/comparison sales area based on a 80%/20% split
 - 2. Higher sales density adopted for purpose of sensitivity test
 - 3. Floorspace efficiency at +0.4% per annum for convenience goods and +1.8% per annum for comparison goods applied between 2017 and 2022
 - 4. 95% of store turnover derived from Study Area, based on Turley assumptions

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TABLE 12: SENSITIVITY TEST - TURNOVERS OF EXISTING CONVENIENCE GOODS CENTRES AND LOCATIONS - 2022

Destination	Total Turnover 2022 (£m)	Diversion to Proposal (%)	(£m)	Resultant Turnover (£m)	Impact (%)
<u>Havant Borough Council</u>					
Hayling Island - Mengham/Gable Head District Centre					
Co-op, Elm Grove	4.68	5%	0.23	4.45	-5.0%
Sainsbury's Local, Mengham Road	1.27	2%	0.09	1.18	-7.3%
<i>Sub-total</i>	<i>5.95</i>	<i>7%</i>	<i>0.33</i>	<i>5.63</i>	<i>-5.5%</i>
Hayling Island - Edge/Out of Centre					
Co-op, Selsmore Road	2.05	2%	0.09	1.95	-4.6%
Tesco Express, Station Road	1.32	1%	0.05	1.27	-3.6%
Havant Town Centre					
Waitrose, North Street, Havant	16.37	5%	0.23	16.13	-1.4%
Leigh Park District Centre					
Iceland, Greywell Road, Leigh Park	2.14	1%	0.05	2.10	-2.2%
Waterlooville Town Centre					
Waitrose, Dukes Walk, Waterlooville	30.25	0%	0.00	30.25	0.0%
Edge/Out of Centre Stores					
Tesco Extra, Solent Road, Havant	57.05	30%	1.40	55.64	-2.5%
Asda, Larchwood Avenue, Bedhampton	69.26	10%	0.47	68.79	-0.7%
Aldi, Central Retail Park, Park Way, Havant	26.69	10%	0.47	26.23	-1.8%
Asda, Portland Road, Waterlooville	42.98	0%	0.00	42.98	0.0%
Other Stores Havant Borough Council	68.81	5%	0.23	68.58	-0.3%
<u>Portsmouth City Council</u>					
Sainsbury's Superstore, Fitzherbert Road, Farlington	33.92	4%	0.19	33.73	-0.6%
Tesco Express, Havant Road, Farlington	4.45	4%	0.19	4.26	-4.2%
Asda, Fratton District Centre, Portsmouth	36.03	3%	0.14	35.89	-0.4%
Morrisons, Victory Retail Park, Flathouse Road, Portsmouth	8.21	2%	0.09	8.11	-1.1%
Sainsbury's Local, Guildhall Walk, Portsmouth City Centre	3.50	1%	0.05	3.46	-1.3%
Co-op, Elm Grove, Southsea, Portsmouth	3.42	2%	0.09	3.33	-2.7%
Co-op, Highland Road, Southsea	4.34	1%	0.05	4.29	-1.1%
Other stores	974.70	10%	0.47	974.23	0.0%
Internet	60.12	2%	0.09	60.03	-0.2%
	1,451.56	100%	4.68	1,446.88	-

- NOTES**
1. Turnovers at 2022 derived from Tables 7 & 8
 2. Anticipated trade draw of the proposal based on geographical location of existing provision and like-for-like offer
 3. Turnover of the proposed development derived from sensitivity test in Table 11
 4. Resultant turnover = study derived turnover minus 'diversion to proposal'
 5. Impact based on the proportional change in turnover expressed as a percentage

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