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Retail and Leisure Assessment

For: Proposed Mixed Use Employment, Leisure and Retail Development at former BAE site, Elettra Avenue, Waterlooville, Hants

On Behalf Of:

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Prepared By:

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1.0 INTRODUCTION

1.1 This Retail and Leisure Assessment has been prepared by Harris Lamb Planning Consultancy ('HLPC') in respect of an outline planning application to redevelop the former BAE site for a mixed employment, leisure and retail development. The proposed development will comprise of a range of uses including class B employment and a discount foodstore, an 8-screen multiplex cinema, a tenpin bowling complex, a 60-bedroom hotel, 3 no. restaurants, 1 drive-thru restaurant and 1 public house, together with associated parking, access and landscaping provision.

1.2 This assessment is intended to be read in conjunction with the Planning Statement and the suite of technical reports which are also submitted in support of the application. The Planning Statement describes the makeup of the scheme and explains how the final development of the site will be able to draw upon a range of well contained in this application.

1.3 This assessment has been prepared to:

- Set out the nature of the development proposals and site context;
- Identify the relevant policy context against which the proposal should be assessed;
- Assess the role and health of Waterlooville town centre, Cowplain district centre and Denmead local centre in respect of the retail element of this proposal;
- Assess the extent of retail, leisure and other needs in Waterlooville and the ability for these to be met by this proposal;
- Explain the sequential approach to site selection that has been adopted, including an assessment of whether there are any other sequentially preferable sites available to accommodate the proposed development within its defined catchment area;
- Assess the likely quantitative trading impact of the retail element of this proposal and its implications for the vitality and viability of the aforementioned centres; and

- Assess the proposal against the retail policy tests contained within the National Planning Policy Framework (NPPF), the adopted Local Plan and emerging Development Plan.
- 1.4 **Section 2** of this Assessment provides detail on the background to this proposal, in the context of the site's recent planning history and subsequent dialogue with Havant Borough Council.
- 1.5 **Section 3** describes the site and its context, including details of the existing development.
- 1.6 **Section 4** sets out the proposed development in detail and provides a breakdown of the quantum of floorspace and respective elements;
- 1.7 **Section 5** outlines the relevant planning policy framework against which the proposal should be assessed.
- 1.8 **Section 6** identifies current shopping provision and patterns within the defined catchment area, utilising the findings contained within the Havant Town Centres, Retail and Leisure Study 2009.
- 1.9 **Section 7** sets out the scope and methodology of the retail impact assessment in respect of the discount foodstore element of the proposal;
- 1.10 **Section 8** provides an assessment of the quantitative and qualitative impacts of the retail element of the proposal, which is supported by the impact tables provided in Appendix 4.
- 1.11 **Section 9** sets out the approach and findings of the comprehensive sequential assessment undertaken in respect of the retail, leisure and ancillary elements of this proposal.

- 1.12 **Section 10** identifies the current leisure offer within the Waterlooville catchment area, in the context of competing facilities elsewhere, and assesses the qualitative impact of this proposal.
- 1.13 **Section 11** summarises the key findings of this assessment and our concluding comments.

2.0 BACKGROUND AND CONTEXT

- 2.1 The Council will be aware that the site formerly operated as the BAE Systems Technology Park, following its acquisition from Marconi in 2000. There are a number of buildings on site which are now largely unoccupied, having formerly served as research and development facilities for BAE.
- 2.2 Discussions were entered into with the Council as early as October 2009 to progress an alternative form of development for the site. This culminated in an application for 6,799 m² of Class B1, B2 and B8 development, in addition to a sui generis car showroom use, Class C1 hotel and ancillary Class A3/A5 ancillary restaurant facilities being submitted to the Council in June 2012.
- 2.3 The Council resolved to grant planning permission for the proposals in October 2012, the resolution being subject to a S106 legal agreement. This was duly signed and the planning permission released on 31st July 2013 (Ref. APP/12/00652).
- 2.4 As part of the above application, the Council will be aware that the applicants submitted a substantial body of marketing evidence which demonstrated that there was a lack of demand for the existing quantum of Class B use floorspace on the site and that accordingly, it should be reduced with alternative uses brought forward to ensure a viable redevelopment of the site.
- 2.5 It has become clear following a significant marketing campaign that there is no occupier demand for the revised quantum of Class B1, B2 and B8 floorspace identified in the consented scheme. This must be viewed in the context of competing sites and facilities elsewhere including Lakeside Portsmouth and Langstone Technology Park, Havant. The lack of demand is a significant concern since the proportion of Class B use floorspace accounts for approximately 50% of the total site area available.

- 2.6 In light of the above, it not possible to develop the site on a speculative basis without having suitable occupier interest. Therefore, it has become necessary to consider an alternative mix of development for the site to ensure it can be brought back into productive and viable with the creation of a range of job opportunities to support the local economy.
- 2.7 Further discussions with the Council regarding a revised mix of development for the site has since ensued, culminating in meetings being held with planning officers on 10th July and 6th August 2013. During these meetings, officers were advised of the considerable interest expressed from retail and leisure operators in developing a complementary offer at the site, which would also be served by ancillary Class A3, A4 and A5 facilities, and a medium-sized hotel not dissimilar to that included within the previously consented scheme. The scheme also has the potential to retain an element of Class B use through the resolution of Block E which is currently occupied.
- 2.8 At the meeting on 6th August 2013, an initial masterplan of the proposals for the site was presented for discussion, the outcome of which has informed the finalised scheme herein submitted.
- 2.9 During the meetings with the Council, officers acknowledged the demand and need for from cinema and associated leisure operators in opening new facilities in Waterlooville, and intimated that Class D2 leisure development in particular could potentially be supported on the site, subject to the relevant planning policy tests being satisfied. It was noted that certain leisure was and other uses complimentary to the adjoining business park have been established by the grant of planning permission Ref:APP/12/00652.
- 2.10 In particular, officers have acknowledged that the site should not remain vacant in perpetuity and that securing its viable redevelopment is an important objective, both in terms of its physical regeneration but more importantly in the context of boosting economic growth in the Borough.

- 2.11 Having agreed the approach to be taken in respect of this application, the full implications of a retail and leisure development on the site have been comprehensively assessed, in particular having regard to the site's sequential status in satisfying the key town centre use tests set within the NPPF and adopted local plan policy. This is set out in the following sections of this report.

3.0 DESCRIPTION OF SITE AND CONTEXT

- 3.1 The application site comprises 5.7 ha of developed land and is situated 0.3 miles to the north-west of Waterlooville town centre. The site lies adjacent to the wider Brambles Business Park which provides an extensive number of buildings in Class B use.
- 3.2 Bounded by Elettra Avenue to the north and west, and Silverthorne Way to the south, the site is afforded a frontage along the B2150 Hambledon Road which provides direct linkage with the town centre and residential areas to the north.
- 3.3 The site currently comprises of the following buildings:
- 'Main Building': a three-storey complex accommodating 19,498 m² of Class B1(b) research and development use.
 - Former Restaurant: 973 m².
 - 'E Block': 6,726 m² of light industry (Class B1(c) use).
 - 863 car parking spaces.
- 3.4 An adjacent building referred to as 'Beamplot' will remain in operational use for employment purposes and is excluded from the red line boundary for the purposes of this application.
- 3.5 All buildings are of 1980s construction and are of functional design and appearance. E Block is less visible from the site frontage along Hambledon Road, being of single-storey height and largely screened by the taller main building.
- 3.6 The primary access into the site is from Elettra Avenue, via a dedicated arm off the roundabout junction. Additional points of access into the site also exist from Silverthorne Way. Delivery arrangements for the buildings utilise the Elettra Avenue access.

- 3.7 Notwithstanding the existing buildings, the majority of the site comprises of hard surface car parking. There is very little landscaping provision within the site; this is largely limited to established tree and shrub planting around its perimeter.
- 3.8 The site is not within or adjacent to a Conservation Area and is not subject to any other designations. There are no buildings or structures which are statutory or locally listed, and no tree preservation orders (TPOs) exist on the site. The site is classified by the Environment Agency as being within Flood Zone 1.

Wider Area

- 3.9 The site is proximate to the West of Waterlooville Major Development Area (MDA). Falling with the administrative boundary of Winchester City Council, this area has been identified to accommodate up to 3,000 new homes in the emerging plan period, 450 of which are currently being delivered by Taylor Wimpey on land at Oak Farm to the south of Hambledon Road. The remaining 2,550 homes are to be delivered by the Grainger Trust on land west of London Road, Purbrook.
- 3.10 Grainger Trust obtained planning permission in 2008 to deliver a first of development consisting of 1,550 new dwelling units, in addition to 7.19 ha of Class B employment uses and a new local centre (LPA Ref. 06/02538/OUT). However, Grainger subsequently revised the scheme and submitted a hybrid planning application for development which was granted permission in March 2012 (LPA Ref. 10/02862/OUT).
- 3.11 The hybrid scheme comprises of outline planning permission for up to 2,520 dwellings, to be delivered in 13 phases. Full planning permission has been granted for the first phase (194 dwellings) and this is now under construction whilst applications for reserved matters consent to deliver the latter phases are anticipated during 2013.

- 3.12 Whilst the application is centrally located and within close proximity of the West of Waterloo MDA, it is also proximate to a new supermarket development coming forward by Sainsbury's on the former Salvador Caetano coachbuilders site which is adjacent to the Wellington Retail Park (Ref. APP/10/107930). Development on the site has commenced, albeit subject to delay whilst the scheme has been re-planned. When complete, it will provide a supermarket with a net sales area of 4,188 m².

4.0 PROPOSED DEVELOPMENT

- 4.1 This application seeks outline planning permission for a mixed-use development comprising of a discount foodstore, 8-screen cinema, 20-lane tenpin bowling complex, fitness centre, 60-bedroom hotel, 3 no. restaurants, 1 no. public house, and 1 no. drive-thru restaurant, to be served by 707 parking spaces and associated access and landscaping. A detailed breakdown of the scheme's components is provided below.

Development	Use	Floorspace
Discount Foodstore	Class A1	1,532 sq m GIA (1,125 sq m net sales)
Cinema (8 screens / 1,300 seats)	Class D2	3,250 sq m GIA
Bowling Complex (20 lanes)	Sui Generis	2,320 sq m (Conversion of E Block)
Fitness Centre / Gymnasia	Class D2	1,720 sq m (Conversion of E Block)
Budget Hotel (60 bedrooms)	Class C1	2,790 sq m GIA
Restaurant	Class A3	370 sq m GIA
Restaurant	Class A3	370 sq m GIA
Restaurant	Class A3	370 sq m GIA
Restaurant	Class A3	555 sq m GIA
Restaurant (Drive-Thru)	Class A3/A5	335 sq m GIA
Total		13,612 sq m GIA

- 4.2 The proposals would result in the part redevelopment of the existing site to accommodate the foodstore, cinema, hotel and ancillary restaurant / public house uses. However, E Block will be retained in the interim for Class B1

use (4,040 sq m²), with subsequent conversion to a tenpin bowling complex and fitness centre.

- 4.3 The discount foodstore will comprise a net sales area of 1,125 m², of which 80% (900 m²) will be for the sale of convenience goods and the remaining 20% (225 m²) for comparison goods. Further details on the range of goods to be sold from the unit are provided in Section 8 of this report.
- 4.4 It is anticipated that the operator of the foodstore will be Aldi. Active discussions are being undertaken with Cineworld as the prospective operator of the cinema. Similarly discussions are underway with McDonalds to operate the drive-thru facility, Frankie and Benny's to operate one of the restaurants, and Marston's to operate the public house. Whilst an operator for the bowling complex will be confirmed shortly, it is expected that the hotel will be operated by Premier Inn.
- 4.5 The proposed scheme is examined in more detail in the Planning and Design and Access Statements which have also been submitted in support of this planning application.

5.0 PLANNING POLICY OVERVIEW

- 5.1 This section provides an overview of the relevant national and local planning policy context against which this application should be assessed. A summary of relevant evidence base documents is also provided.

National Planning Policy

National Planning Policy Framework

- 5.2 The National Planning Policy Framework ("NPPF"), published in March 2012, is a material consideration in the determination of applications for planning permission and guides plan-making by local authorities. The NPPF replaces the former Planning Policy Guidance Notes (PPGs) and Planning Policy Statements (PPSs).
- 5.3 Underpinning the NPPF are 12 core planning principles which should guide the formulation of development plan policy and the decision-making process. In summary, planning should:
- (1) Be plan-led with development plans kept up to date to ensure decisions can be made with a high degree of predictability and efficiency
 - (2) Be creative in finding ways to enhance and improve places
 - (3) Proactively deliver sustainable economic development to deliver homes business, industry and infrastructure, identifying the needs within an area and responding positively to growth
 - (4) Secure high quality design and amenity with new development
 - (5) Promote the vitality of urban areas and protect the Green Belt areas around them
 - (6) Support the transition to a low carbon economy, including the use of renewable energy resources
 - (7) Contribute to conserving and enhancing the natural environment

- (8) Encourage the re-use of previously developed land that is not of high environmental value
- (9) Promote mixed use developments, recognising that some open space can provide many different functions
- (10) Conserve heritage assets
- (11) Manage patterns of growth in the most accessible locations
- (12) Support strategies to improve health, social and cultural wellbeing.

5.4 The NPPF sets out three sustainable development principles, which require local planning authorities to:

- (1) Build a strong, responsive and competitive economy by ensuring there is sufficient land available to support growth.
- (2) Support communities by providing for the supply of sufficient housing to meet present and future needs in locations that are accessible to local services.
- (3) Protect and enhance the built, natural and historic environment.

5.5 The NPPF contains a *presumption in favour of sustainable development* which means that a proposal may be granted planning permission where a local authority's development plan is absent, silent or whose policies are out-of-date, unless in doing so, any adverse impacts would *significantly* and *demonstrably* outweigh the benefits or the development conflicts with a specific policy in the NPPF.

5.6 The NPPF places increased emphasis on the delivery of sustainable development in order to promote a strong and competitive economy (Paragraphs 18-22), and outlines the Government's commitment to securing economic growth through the planning system.

5.7 Section 2 of the NPPF '*Ensuring the vitality of town centres*' states that the need for retail and leisure development, as well as other main town centre uses, is not compromised by limited site availability.

- 5.8 Paragraph 24 of the NPPF requires that local planning authorities apply a sequential test to planning applications for main town centre uses that are not in a town centre and not in accordance with an up-to-date Local Plan. In considering edge and out of centre sites, preference should be given to accessible sites that are well connected to the town centre, with flexibility demonstrated in terms of format and scale.
- 5.9 Paragraph 26 of the NPPF states that applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date Local Plan, should be supported by an impact assessment where the proposed floorspace exceeds a locally set threshold or a default of 2,500 m². This should include an assessment of:
- The impact on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - The impact 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.

Planning for Town Centres: Practical Guidance on need, impact and sequential approach (December 2009)

- 5.10 Notwithstanding the superseding of PPS4, its Practice Guidance remains in place to assist the assessment of sequential and impact matters associated with development proposals for main town centre uses on edge and out of centre sites.

Planning for Growth 2011

- 5.11 The Written Ministerial Statement “*Planning for Growth*” was issued on 23 March 2011 and emphasised that the key role of the planning system is to ensure that sustainable development which promotes economic growth should be able to proceed as easily as possible. The guidance set out in the statement is material to the determination of planning applications, with a

clear expectation that sustainable development should be approved wherever possible.

Development Plan

Havant Borough Core Strategy

- 5.12 The Havant Borough Core Strategy, adopted in March 2011, sets out the development framework for the Borough to 2026. A number of its Strategic and Development Management policies are relevant to this application.
- 5.13 **Policy CS4** sets out the approach to development within the Borough's Town, District and Local Centres. It identifies a requirement for 13,000 m² of additional comparison goods floorspace up to 2016 for the identified centres. The policy defines Waterlooville together with Havant as a Town Centre, whilst a number of District and Local Centres are also identified.
- 5.14 Paragraph 3.39 of the Core Strategy states that applications for town centre uses on sites which are outside of town centres, in particular those for new retail floorspace, will be required to demonstrate in a 'robust and transparent manner' the application of the sequential approach to site selection and an assessment of impact.
- 5.15 Paragraph 3.50 of the Core Strategy acknowledges that the provision of leisure and entertainment facilities in the Borough is limited, with potential scope for additional cinema and other leisure facilities.
- 5.16 **Policy CS5** of the Core Strategy seeks to promote tourism within the Borough and states that planning permission will be granted for appropriate development proposals, including those for hotel accommodation.
- 5.17 **Policy CS6** promotes the regeneration of the Borough through the identification of a number of the key development objectives. Sub-section 2(b) of the policy refers to the integration of the Major Development Area (West of Waterlooville) with Waterlooville town centre. The policy requires that all relevant development proposals should bring social, environmental

and economic benefits to the Borough. Policy CS18 provides further guidance on the integration of the town centre with the MDA, which is expected to accommodate 3,000 new homes.

Havant Borough District-Wide Local Plan

- 5.18 A number of policies have been 'saved' from the Havant Borough District-Wide Local Plan, adopted in 2005. It is intended that these will be superseded through the adoption of future development management documents.
- 5.19 Saved Policy TC1 sets out the hierarchy of centres in the Borough and requires that proposals for new development should be of a scale which is appropriate to the role of each centre.

Emerging Development Plan

Draft Havant Borough Local Plan Allocations

- 5.20 The Draft Allocations Plan is being progressed towards Pre-Submission stage, following public consultation which ended on 22nd January 2013. It is anticipated that the Allocations document will be adopted in 2014.
- 5.21 The draft document identifies the application site under policy reference WA2 which seeks to promote its allocation for employment uses. The site is referenced as BD54 on the Waterlooville map enclosed in Appendix 3 of the draft document. Appendix 4 identifies a revised town centre boundary for Waterlooville, to encompass the Wellington Retail Park and the former Salvador Caetano site, which committed for foodstore development. The retail units comprised within the Wellington Retail Park are also identified as a primary shopping frontage.

Evidence Base Documents

Havant Borough Town Centres, Retail and Leisure Study 2009

- 5.22 The Havant Borough Town Centres, Retail and Leisure Study (HTCS) was prepared and subsequently updated for the Council in March 2009 by consultants NLP. Its findings are informed by an assessment of the quantitative need for additional convenience and comparison goods floorspace in the Borough for the emerging development plan period. Its findings in respect of comparison goods are adopted in the floorspace requirement which is set out in Policy CS4 of the Core Strategy.
- 5.23 The healthcheck of Waterlooville town centre undertaken for the HTCS identified that there had been an overall improvement in the health of the centre since 2005, despite the economic downturn (paragraphs 7.10-7.11).

6.0 EXISTING RETAIL PROVISION AND SHOPPING PATTERNS

- 6.1 The study area for this retail assessment is derived from the Havant Town Centres, Retail and Leisure Study 2009 ('HTCS'). This is informed by the findings of the household survey that was undertaken in respect of the HTCS, with Zones 7 to 11 considered to best reflect the catchment from which the foodstore will draw the majority of its trade. A plan of the study area is enclosed in Appendix 1.
- 6.2 The study area is concentrated on Havant Borough West, having regard to the physical barrier presented by the A3(M) and the spatial variations in the location of main food shopping destinations between Havant Borough East and Havant Borough West which are identified in the HTCS. The principal centre within the study area is Waterlooville town centre.

Heathcheck of Waterlooville Town Centre

- 6.3 We have undertaken an updated health check of Waterlooville town centre, using the indicators set out in the former PPS4 (Annex D) and the guidance set out in Part 7 of the PPS4 Practice Guidance which remains in place following the publication of the NPPF.

Composition and Structure

- 6.4 The primary shopping area of Waterlooville town centre is centred on London Road, east of its intersection with Hambledon Road and Stakes Hill Road, taking in the retail area around Dukes Walk and Wellington Way. The western end of London Road and its immediate environs, extending from the intersecting junction, constitutes the defined secondary shopping area of the town centre.
- 6.5 Information obtained from Experian Goad (November 2012) and updated in July 2013 identifies 187 units in the town centre, of which 106 are in retail (convenience and comparison) use, 67 are service uses, and 14 are vacant.

This represents a vacancy rate of 11.9% which is below the national average of 14.1%.

Retailer Representation

- 6.6 Waterloo town centre contains a number of national multiples. In terms of convenience provision, Asda, Waitrose and Iceland are represented in the town centre. Asda has a net sales floorspace of 3,285 m² of which 70% (2,300 m²) is devoted to convenience goods. The Waitrose has a net sales area of 2,289 m² and the Iceland store has 465 m².
- 6.7 In terms of the town centre's comparison retail offer, there is representation from various multiples including Boots, WH Smith, Dorothy Perkins, Holland and Barrett and The Edinburgh Woollen Mill. The proportion of comparison retail units within the town centre is significantly higher than that for convenience retail.
- 6.8 Additional comparison retail, primarily focused on bulky goods provision, is provided within the adjacent Wellington Retail Park and serves to complement the overall offer of the town centre. As such, it is the strength of the town's comparison retail offer which underpins its vitality and viability. Focus have identified 9 retailer requirements for Waterloo town centre at August 2013.
- 6.9 The town centre includes a good mix of service uses including banks and building societies, a post office and a number of pubs, restaurants and cafes.

Footfall

- 6.10 The highest proportion of pedestrian flows were observed along London Road and Dukes Walk, which is the area in which the majority of national multiple retailers are located. Footfall was reduced towards the western end of London Road in the vicinity of the roundabout junction with Maurepas

Way. Footfall was steady between Hambledon Road and Wellington Retail Park, with pedestrians using the subway link beneath the northern section of Maurepas Way.

Accessibility and Car Parking

- 6.11 Whilst Waterlooville town centre does not have any rail links, it is well situated for access via car and benefits from good bus service links with the wider area. Public transport provision is explored in further detail in the Transport Assessment which supports this planning application.
- 6.12 The town centre is well served in terms of car parking. There are public car parks located at Swiss Road, Rockville Drive and London Road, in addition to parking facilities available at Dukes Walk Shopping Centre and the Asda store off Maurepas Way. Additional car parking is available at Wellington Retail Park.

Perception of Safety and Occurrence of Crime

- 6.13 In relative terms, the town centre is considered to be a safe area in which to visit and there is no perceptible risk of crime compared with other centres. The Safer Neighbourhood Team for Waterlooville Central monitors the town centre to deter incidents of crime wherever possible. The town centre benefits from good linkage, with the majority of pedestrian routes enjoying an active frontage which is enhanced by the generally low level of vacancy. As such, the town centre is considered to be a safe environment in which to visit.

Environmental Quality

- 6.14 The general environment within Waterlooville town centre is good. This includes the quality of the public realm, street cleanliness, lighting and seating areas. Overall, the town centre is well maintained with buildings and shop frontages generally well maintained.

Summary

- 6.15 Waterloo town centre is a vital and viable centre which remains healthy despite the economic downturn. This is exemplified by a lower than average vacancy rate. Sustained investor confidence is evident with active requirements from a number of national retailers for representation within the town centre. Good levels of accessibility and car parking provision ensure that the centre is well placed to serve the needs of visitors and occupiers.

7.0 SCOPE OF RETAIL ASSESSMENT

7.1 This section sets out the scope and methodology which has been adopted to assess the impact of the proposed discount foodstore element of this application.

7.2 The methodology adopts a step-by-step approach to the assessment of retail impact, which is summarised below:

1. Definition of a Study Area (SA) for the proposed store and zones to allow for a more fine-grained analysis;
2. Study period (base and design year) and price base;
3. Population and population growth in each zone;
4. Per capita spending on convenience and comparison goods in each zone and projected forward to the base and design years;
5. Calculation of total expenditure available in the SA zones;
6. Establishment of the net sales floorspace and benchmark turnovers of existing stores and facilities within the SA;
7. Identification of relevant commitments within the SA i.e. those schemes with the benefit of planning permission.
8. Identification of the main food and top-up market shares of existing stores and facilities within and beyond the SA, using available household survey data;
9. Identification of the distribution of convenience goods expenditure within and beyond the SA at the base and design years;
10. Identification of the distribution of convenience goods expenditure with the proposed foodstore and commitments at the design year;
11. Assessment of the trade draw from facilities and centres and the respective impacts at the design year; and
12. For comparison goods, assessment of trade draw and respective impacts on facilities and centres, based on 'benchmark' turnovers.

Study Area

- 7.3 The study area is based on Zones 7, 8, 9, 10 and 11 of the study area used to inform the HTCS. This is respectively made up of postcode sectors PO7 5, PO7 8, PO7 7, PO8 8 and PO7 6 and comprises the area from which we would expect the majority of the proposed store's trade to be drawn from.
- 7.4 The extent of the study area is informed by our assessment of shopping patterns presented in the NEMS household survey which informs the HTCS and is considered to provide a reasonable catchment within the Havant Borough West area. This has regard to the spatial variations identified in respect of the main food shopping destinations between Havant Borough West and Havant Borough East which have been identified in the HTCS, and physical barriers to accessibility (most notably the A3(M)). The size of the SA adopted also allows for a more accurate assessment of expenditure inflow and outflow. A plan of the study area and provision of foodstores is enclosed at Appendix 1.

Study Period

- 7.5 The base year is **2013** and design year is taken as **2016**. A design year of **2016** is identified as being the most realistic timeframe within which the proposed development could have successfully completed the planning application process, and have been constructed, whilst also allowing for a period within establish which to trading patterns. This design year has also had regard to guidance set out in the NPPF which requires that smaller scale retail proposals should be assessed up to 5-years ahead. Expenditure data provided for the study area by Experian is in 2011 prices.

Population and Expenditure Data

- 7.6 Population and expenditure data on convenience and comparison retail goods has been provided by Experian (Micromarketer Report, prepared for Harris Lamb in August 2013). The baseline population data at 2011 has

been projected forward using ONS mid-year forecasts. An allowance has been made for anticipated population growth coming forward in the West of Waterlooville MDA, based on a multiple of 2.3 persons per household.

- 7.7 **Tables 2a and 2b** identify the per capita expenditure available for convenience and comparison goods respectively. We have applied the annualised growth rates provided in Experian Retail Planner Briefing Note 10.1 (Figure 1a) to forecast per capita expenditure levels at the design year. An allowance for special forms of trading (SFT) has been deducted, using the adjusted rates derived from Experian Retail Planner Briefing Note 10.1 (Appendix 3). The applied rates are referenced in Tables 2a and 2b.
- 7.8 The multiplication of Table 1 and Tables 2a and 2b provides the total expenditure available for convenience and comparison goods within the SA at the base and design years (Tables 3a and 3b).
- 7.9 **Table 3a** identifies total convenience expenditure available within the SA which will increase by 5.2% from current levels to provide a total of £96.97m at 2016. Total available comparison expenditure will be £147.49m at 2016; this represents an increase of 10.7% on current levels (**Table 3b**).
- 7.10 **Table 4** identifies the net sales floorspace and benchmark turnovers for stores and facilities within the SA. Floorspace figures are informed by the HTCS, GOAD and our informed judgement where necessary. Floorspace figures for Denmead local centre are taken from the Winchester Retail Study Update 2012. These sources also inform the percentage split ascribed to convenience and comparison goods within the overall net sales floorspace figures.
- 7.11 The estimated 'benchmark' turnover of current stores and facilities within the SA is derived from sales density information provided by Verdict 2012 and Retail Rankings 2012, expressed in 2011 prices. An assumption on the percentage of turnover drawn from the SA has been calculated for each store / facility, based on informed judgements. The respective convenience and comparison turnovers for each store / facility are added to provide their total turnover and the proportion drawn from the SA.

- 7.12 **Table 5** identifies the turnover of the proposed foodstore based on the operator's requirements. It is estimated that 85% of the store's turnover will be drawn from the SA.
- 7.13 **Table 6** identifies the net sales floorspace and benchmark turnover of commitments coming forward in the SA. The proportion of turnover drawn from within the SA is also estimated. There are two commitments identified, which are: (1) Sainsbury's store at the former Salvador Caetano site, Hambledon Road; and (2) Unit 6 of Wellington Retail Park, Waterloooville.
- 7.14 Our assessment of the impact of the convenience goods element of the proposed foodstore is set out in **Tables 7 to 11**.
- 7.15 In order to assess the level of trade diversion to the proposed store it is first necessary to analyse the current turnover of existing stores and centres within the SA. Calculation of the base year (2013) convenience goods turnover of existing stores is derived by allocating available convenience goods expenditure in each survey zone to identified stores within the SA. Spending is allocated on the basis of the shopping patterns identified within the household survey.
- 7.16 It is considered that the household survey conducted by NEMS, which informs the 2009 HTCS, remains up-to-date for the purpose of assessing convenience shopping patterns in the SA. No major convenience retail developments have come forward and established trading within the SA since 2009. Outside of the SA, it is noted that the Tesco Havant store has been extended since the HTCS was prepared, however, the majority of its additional net floorspace is devoted to the sale of comparison goods. As such, the enlarged store is not considered to have had any tangible impact on convenience shopping patterns in the Havant Borough West area.
- 7.17 In terms of convenience shopping, the allocation of available expenditure is split between main food and top-up shopping, with the conventional assumption that main food spending represents about 70% of all convenience goods spending, with the remainder (30%) being top-up expenditure. Based on this split, spending in each zone is allocated at the

base year of 2013.

- 7.18 Once spending in each zone is allocated on a main food/top-up basis, the expenditure allocated to each store/centre can be added together across the zones to give the total turnover of that store derived from the SA. The proportion (%) of a store's turnover derived from outside the SA is estimated to give a total turnover (£m) at the base year for each centre/store.
- 7.19 Using the above analysis, the trade draw of each store can also be calculated. This is the proportion (%) of a store's trade attracted from a particular zone. Adding up the trade draw for each store drawn from the SA zones provides the trade draw from the SA.
- 7.20 An assumption is then made for the percentage of trade draw to an individual store derived from outside of the Study Area i.e. inflow. This is added to the trade draw of the store derived from within the Study Area to give the total turnover of the store. The resultant turnover levels can be compared with company averages of these stores to determine whether stores are overtrading (i.e. above company average) or under-trading.
- 7.21 Account is then taken of changes in store/centre performance between the base year (2013) and the design year (2016) by allocating spending growth in line with the household survey results (**Table 8**). In the convenience goods sector this process simply allocates spending growth to existing stores / centres in the same proportion as the base year spending.
- 7.22 **Table 9** identifies the trade draw pattern of the proposed Aldi store in the context of adjusting the market shares of stores and centres within and beyond the study area at the design year.
- 7.23 The next stage is to introduce the committed developments in the design year (2016) (**Table 10**). This table adjusts market shares for each existing store on the basis of where known commitments are likely to draw trade from. We have undertaken this analysis on a zone by zone basis for both main food and top-up shopping patterns. The trade draw patterns identified within the respective retail impact assessments which accompanied the

planning applications for the commitments have been adopted, given the Council's acceptance of these in granting planning permission.

- 7.24 **Table 11** provides a summary of the solus impact of the proposed foodstore on existing stores and centres, and the cumulative impact of the foodstore with the Sainsbury's and Wellington Retail Park commitments.
- 7.25 For comparison goods impact, it is not considered necessary to assess the impact of the comparison goods element of the proposed store to the same level as that taken for the convenience goods element. Notwithstanding a similar approach taken in respect of the retail impact assessment submitted in respect of the Sainsbury's scheme, the quantum of floorspace which would be devoted to the sale of comparison goods within the proposed foodstore is too small to warrant its assessment on a market-share approach. In addition, there is sufficient surplus expenditure available within the SA to more than support the additional comparison goods sales floorspace identified for both the proposed foodstore and commitments. Table 11 demonstrates the trade draw and impacts on comparison facilities within the SA, based on a benchmark approach.

8.0 RETAIL IMPACT ASSESSMENT

8.1 Our assessment of retail impact has been undertaken in accordance with the requirements set out under paragraph 26 of the NPPF. Whilst the size of the proposed Aldi store is well within the default threshold (2,500 m²) identified in the NPPF, we have nonetheless undertaken a full quantitative assessment of impact in light of discussions with the Council and to demonstrate robustness.

8.2 The principal impact tests to consider are:

1. 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
2. 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.

Quantitative Impact Analysis

8.3 As set out in Section 7.0 of this report, we have assessed the anticipated convenience trade draw of the Aldi store utilising the household survey undertaken by NEMS for the HTCS. The results of the survey have been used to estimate existing market shares within each of the five zones which make up the study area. The market shares have been projected forward to 2016 and adjusted to exclude 'internet' and 'don't know' responses.

8.4 In addition, the market shares have also been adjusted to take account of known commitments. A minor re-adjustment of the market share for the Iceland store in WaterlooVille town centre has been made, as the household survey under-estimates the store's trading performance.

8.5 The convenience turnover of the Aldi store has been calculated by applying the company average sales density (£8,495/m² at 2011 prices) to the net

convenience floorspace (900 m²). On this basis, we have calculated a convenience turnover for the store of £7.65m in 2016, of which £6.50m will be drawn from the study area (Table 5, Appendix 4).

- 8.6 Similarly, the comparison turnover of the Aldi store has been calculated by applying the company average sales density (£2,976/m² at 2011 prices) to the net comparison floorspace (225m²). This results in an expected turnover of £0.67m of which £0.57 will be drawn from the study area.
- 8.7 The comparison trade draw of the Aldi has been assessed against the benchmark turnover of stores within and beyond the study area. As referred to in Section 7 of this report, this approach is considered the most appropriate in respect of this proposal given the store's limited comparison retail offer and correspondingly negligible level of turnover.
- 8.8 The Aldi store is expected draw the highest proportion of its trade (25%) from Zone 9, which is the central zone for WaterlooVille. Whilst a significant proportion of trade will also be drawn from Zones 10 and 11, which respectively include the Cowplain and Denmead areas, the Aldi will also draw trade from the southern and eastern parts of the study area.
- 8.9 Our assumptions are adopted on the basis that the Aldi will have a relatively wide influence within the study area, given that discount food retailers are currently under-represented in Havant Borough West. This assumption has regard to the trading pattern for the Lidl store as identified in the HTCS; this store draws trade from all of zones within the study area and beyond.
- 8.10 The expected trade draw patterns of the Aldi store are demonstrated in Table 9 of Appendix 4. The majority of the new store's trade is expected to be diverted from the Asda at Maurepas Way, Morrisons at Lakesmere Road, Horndean, and the Lidl at London Road, Cowplain. This reflects the proximity and extent of the stores' like-for-like retail offer. Additionally, we expect a smaller proportion of trade to be drawn from other stores beyond the study area, including the Asda store at Larchwood Avenue,

Bedhampton.

- 8.11 To determine the level of impact arising from the Aldi store, the pre-proposal turnover of each store at 2016 is compared with the turnover following the development (Table 9, Appendix 4). The estimated trade draw and solus impact of the Aldi store on individual stores and centres is identified in Table 11.

Impact on Waterloooville Town Centre

- 8.12 The Aldi store is expected to divert £2.85m from the Asda store at Maurepas Way, resulting in an impact of 8.6% on convenience turnover. When aggregated with its comparison turnover, the total impact on the Asda will be 7.1%.
- 8.13 The level of trade diverted from the Waitrose store at Dukes Walk in the town centre is expected to be negligible (£0.27m), resulting in an impact of just 1.7% on the store's turnover. Whilst Waitrose offers a small number of lower priced products in its 'Essential' range, it remains a premium food retailer and does not compete with the discount supermarket operators. Accordingly, the Waitrose will not experience any tangible impact from the trading of the Aldi store.
- 8.14 The Aldi store is expected to draw a very small amount of trade from other shops and stores within Waterloooville town centre. The format of Aldi does not include many of the high street retail elements typically found within the larger-format stores traded by the main supermarket operators. As such, the store will not include fresh meat and fish counters, a bakery, pharmacy or any other ancillary counters whose product ranges may otherwise overlap with those sold by independent retailers and national multiples in the town centre.
- 8.15 Having regard to the above, the Aldi store is expected to draw only £0.11m of convenience trade from other town centre stores. Taking into account the

trade diverted from the Asda and Waitrose stores, we expect the total solus impact on Waterloo town centre to be 3.3% with the trading of the Aldi store.

- 8.16 We have also assessed the cumulative impact of the Aldi store with two current commitments which are the new Sainsbury's store, currently under construction on the former Salvador Caetano site at Hambledon Road, and a variation of condition consent granted for Unit 6, Wellington Retail Park, which remains extant.
- 8.17 The estimated turnover of the Sainsbury's store has been calculated by applying the company average sales density derived from Verdict 2012 (2011 prices). The turnover of Unit 6, Wellington Retail Park, is calculated from the average sales density applied in the retail impact assessment which supported the planning application for that commitment (£10,000/m²), with 100% of the available net sales floorspace being traded for convenience goods. The floorspace and turnovers of the two commitments are set out in Table 6 of Appendix 4.
- 8.18 The estimated trade draw patterns for the two committed schemes provided within our assessment are broadly in line with those identified in their respective retail impact assessments, the findings of which were accepted by the Council in granting planning permission. We have made marginal adjustments to the turnovers of both commitments to take into account the trading of the Aldi store. It is estimated that the Aldi will draw £0.76m from the Sainsbury's store, resulting in an impact of 2.2% on its convenience turnover. Whilst the operator for Unit 6 is presently unknown, an allowance of 5% of the Aldi store's turnover is expected to be drawn from the store (£0.30m), given its close proximity. This would result in an impact of 3.4% on the Unit 6 store.
- 8.19 It is expected that the trade diverted from both commitments will be trade which is otherwise diverted from the Asda store. Thus, it is estimated that the convenience impact on the Asda from the Aldi will be reduced to 5.4%.

This reflects a relatively small level of re-diversion, as we would not expect the majority of customers defecting from the Asda to the Sainsbury's or Unit 6 stores to then change again by shopping in the Aldi.

- 8.20 The cumulative impact on the town centre Asda store with the trading of the Sainsbury's and Unit 6 stores is estimated to be 26%. The Asda store is currently over-trading and at 2016, will have a total turnover of £42.16m, against a benchmark turnover of £39.70m. With the total trade diversion taken into account (£11.03m), the Asda store would trade at around 80% of its benchmark. It is considered that the store would continue to trade viably at this level of turnover. Notwithstanding this, the impact will be reduced by the growth in available convenience and comparison expenditure which has been forecast beyond 2016 (Tables 3a and 3b, Appendix 4).
- 8.21 In respect of the Waitrose store at Dukes Walk, the total trade diversion would be £3.52m, representing an impact of 22.9%. Notwithstanding this, it is important to note that the vast majority of the trade diverted (£3.25m) will be to the two committed schemes, based on the trade draw patterns identified in the retail impact assessments which were submitted and accepted by the Council. As the Aldi will not compete with the Waitrose store, its trading will have no tangible effect on the latter's turnover.
- 8.22 It is acknowledged that Waterlooville's town centre boundary will be extended to include Wellington Retail Park and the new Sainsbury's store at Hambledon Road. This is set out within the emerging Havant Borough Local Plan Allocations document, the details of which are discussed in Section 5 of this report.
- 8.23 In view of the above, the turnovers of the two committed stores have been accounted for within the total turnover of Waterlooville town centre at 2016 (Table 12, Appendix 4). With the trading of the Aldi taken into account, the addition of the two committed stores will effectively increase the town centre's total retail turnover by £51.68m.

- 8.24 For the purposes of assessing cumulative impact, the increase in turnover will counter diverted trade in delivering a positive impact of 34% on the town centre. This will serve to strengthen Waterloooville's role as a Town Centre within the Borough's retail hierarchy, which will be bolstered by the increased retention of expenditure which is currently flowing out to facilities beyond the study area. This will continue to ensure that the town centre remains vital and viable.

Impact on other centres within the Study Area

- 8.25 Beyond Waterloooville town centre, the impact of the Aldi store on Cowplain and Denmead centres has also been assessed, having regard to their respective retail offers. It is estimated that the Aldi store will draw £0.80m from the Lidl store at Cowplain, resulting in an impact on its convenience turnover of 20.3%. This represents the highest proportion of trade drawn to the Aldi following that diverted from the Asda and Morrisons stores. This reflects the like-for-like retail offer of the Lidl and its accessible location which is approximately 1.2 miles' distance from the application site.
- 8.26 The turnover of the Lidl at 2016 pre-Aldi will be £4.23m. This represents over-trading of some £1.36m (47%) when compared with the company average benchmark (Table 4, Appendix 4). The strong performance of the Lidl store is expected, given the lack of discounter representation in the study area.
- 8.27 However, even with the Aldi taken into account, the Lidl store will continue to trade above the company average level. Accordingly, the impact from the Aldi can be easily absorbed and the Lidl will continue to trade viably. Having considered the wider offer of Cowplain district centre, the diversion of trade from the Lidl is not expected to impact on the propensity for linked trips from that store.
- 8.28 In respect of Denmead local centre, it is estimated that the Aldi will draw a small proportion of trade from the Co-op on Hambledon Road (£0.24m),

resulting in an impact of 5.6%. This store is also shown to be over-trading, amounting to £1.37m at 2016. The Co-op performs a top-up role within the local centre and benefits from a walk-in catchment. In view of these factors, the impact arising from the Aldi will not harm the viability of the Co-op or the wider local centre.

- 8.29 It is assessed that the projected trade draw of the proposed Aldi store from Waterlooville town centre and other centres in the study area (Cowplain and Denmead) will not have a significant adverse impact upon their vitality and viability.

Impacts outside of the Study Area

- 8.30 The proposed Aldi store is expected to draw £2.19m of convenience trade from stores beyond the study area. The majority will be drawn from the Morrisons store at Lakesmere Road, Horndean (£1.22m) and the Asda at Larchwood Avenue, Bedhampton (£0.70m). This represents a small level of trade diversion, relative to that estimated for the new Sainsbury's store whose size and offer will enable it to compete on a like-for-like basis. Both the Asda and Morrisons stores are out of centre and therefore not a concern in impact terms.
- 8.31 In addition to the above stores, a very small proportion of trade (£0.25m) is expected to be drawn from other stores beyond the study area. There are no centres beyond the study area which will be adversely impacted upon with the trading of the Aldi store.

Impact on existing, committed and planned investment

- 8.32 As demonstrated above, the level of trade drawn from the town centre Sainsbury's and Wellington Park commitments will be negligible, resulting in respective impacts of just 2.2% and 3.4% based on the stores trading at company benchmark levels. There will be no impact on the stores' ability to trade viably and as such, these investments will not be harmed.

- 8.33 We are not aware of any other committed or planned investment within Waterloo ville town centre or indeed within any of the other centres within the study area.

Qualitative Impact

- 8.34 The addition of the proposed Aldi store will enhance the main food retail offer of Waterloo ville, ensuring a balanced representation of food operators in the town. Whilst the Sainsbury's and Wellington Retail Park stores will improve the mid-market offer of Waterloo ville, there is a need for a complementary discount offer which is currently under-represented.
- 8.35 The Aldi will help to meet the needs of less affluent shoppers who are currently under-served by the available retail offer in Waterloo ville. This will improve choice and competition within the local retail catchment.
- 8.36 The proposed Aldi store will be situated in a readily accessible location and will be within 300 metres of the revised town centre boundary for Waterloo ville. The planned improvements to the Elettra Avenue site, which will include pedestrian and cycle access, will in turn improve linkage with the town centre.
- 8.37 There is a propensity for linked trips between the Aldi and the town centre, as the store's offer is intended to complement (and not overlap with) the offer of High Street retailers. This enables shoppers to combine their trip to the Aldi with other shops and stores whose offer will not be provided by the Aldi.
- 8.38 In summary, the addition of the Aldi store will deliver a marked improvement in the qualitative retail offer of Waterloo ville, in particular complementing the offer of existing shops and stores within the town centre.

9.0 SEQUENTIAL ASSESSMENT

- 9.1 A sequential assessment of the proposed development has been carried out in accordance with the requirements of paragraph 24 of the NPPF. This requires that main town centre uses should be directed to town centres in the first instance, followed by edge-of-centre sites that are accessible and well connected to a town centre, and finally accessible out-of-centre sites. In undertaking the sequential assessment, the NPPF requires that flexibility is demonstrated in terms of format and scale.
- 9.2 Whilst the distance between the application site and the town centre would be within 300 metres of the revised town centre boundary, the distance between the retail component of the proposed development (i.e. the discount foodstore) and defined primary shopping frontage would be approximately 350 metres. Whilst this exceeds the typical threshold of 300 metres applied in respect of edge-of-centre sites, the application site is well connected with, and easily accessible to Waterlooville town centre. Moreover, the site's location and its future development are pivotal to facilitating access between the town centre and the West of Waterlooville MDA.
- 9.3 Waterlooville town centre is considered to be the only centre within Havant Borough West which would meet the need for increased retail and leisure provision, relative to the type and scale proposed. This takes into account the need to reverse the leakage of retail and leisure expenditure from within the Waterlooville catchment area, which is being primarily directed towards out of centre facilities in Havant and Portsmouth.

Retail Component

- 9.4 The proposed Aldi store has a gross floorspace area of 1,532 m². Whilst this is Aldi's identified requirement, we have, nonetheless, sought to demonstrate flexibility in our approach to site selection by considering alternative sites which could accommodate a similar or potentially smaller

amount of floorspace and still provide a similar retail offer to the proposed store. In this regard, we have investigated sequential sites which could accommodate a unit of 1,300 m² gross floorspace; this is considered to be the minimum required to provide an adequate discounter offer.

- 9.5 In addition to the above, the operator requires a prominent and easily accessible location, both by pedestrians and by car, and which is served by dedicated car parking.
- 9.6 The methodology adopted in identifying site availability is based on the following:
1. Review of current and emerging development plan documents to identify sites allocated for retail development within the town centre;
 2. Review of extant planning permissions and proposals through discussion with the local authority; and
 3. Undertaking a detailed survey of town centre sites and vacant buildings with occupancy potential.
- 9.7 In assessing available sites, consideration has been given to whether the requirements of the operator could be adequately met. These include the ability for the site to be appropriately serviced by delivery vehicles and whether there is suitable car parking provision available in the interests of highway safety and impact. In addition, the commercial viability of redevelopment must also be a factor for consideration, taking into account any existing site constraints.

Vacant Sites

- 9.8 We have identified 21 vacant units within the town centre. These are:
- 2 The Boulevard Precinct (120 m²)
 - 14 The Boulevard Precinct (60 m²)
 - 17 The Boulevard Precinct (90 m²)

- 5 The Boulevard Precinct (70 m²)
- 3 The Boulevard Precinct (120 m²)
- 230 London Road (230 m²)
- 79 London Road (110 m²)
- 81C London Road (350 m²)
- 3 Queen's Parade (90 m²)
- 2 Queen's Parade (90 m²)
- 12 Wellington Way (70 m²)
- 10 Wellington Way (80 m²)
- 9 Wellington Way (90 m²)
- St Georges Walk (200 m²)

9.9 On the basis of the above, there are no units currently available which are of a size that could accommodate the identified foodstore. As such, the units are unsuitable and are discounted from this assessment.

Allocated Sites

9.10 The Havant Borough Local Plan allocates a number of potential development sites which are addressed below.

1. **Stakes Hill Road** (Saved Policy TC2): This site comprises the former access to the Albert Road car park and is identified for a retail or service use with pedestrian access to the car park retained alongside. However, the site is not of a sufficient size to accommodate the proposed foodstore.

Notwithstanding the above, it is evident that this site has experienced a prolonged period of vacancy which indicates that it is not viable for the type of development identified. Given that the site did not come forward for development pre-2008, it is considered that improving economic circumstances are unlikely to change this position. For these reasons, the site is discounted.

2. **Land adjoining 310-312 London Road (Saved Policy TC3):** This site is identified for small-scale mixed use development comprising of a retail / office use at the ground floor with residential above, and could include Nos. 310–312 for redevelopment. The prospective servicing arrangement would be from Curzon Road. This site has also been identified as a potential development opportunity in the HTCS (Site Ref. WAT1).

This site has been the subject of a varied planning history, with consent granted in 2008 for a mixed use development consisting of 954 m² retail floorspace in three retail units and 14 residential units above (Ref. 08/71767/002). The planning permission has since expired, following a period marketing for development which did not come to fruition. Subsequent proposals by the site owners, London and City Land Ltd, to increase the proportion of residential development originally envisaged have also not come to fruition. This indicates a clear lack of viability, with the site unable to meet market requirements.

The site's present use as a public car park is beneficial to the town centre and is considered to be the only viable use in the short term. Notwithstanding the constraints imposed in terms of size, having regard to the maximum quantum of retail floorspace that was considered by the Council to be acceptable on the site, there are amenity impact concerns within the immediate area which will conflict with the delivery requirements and general operations of a foodstore in this location. This is affirmed by the existence of a planning condition relating to Nos. 310-312 which restricts deliveries to the premises before 8.00 am Monday to Saturday, and at all times on Sundays and Bank Holidays.

On the basis on the above issues, this site is considered to be unsuitable for the proposed foodstore and is discounted accordingly.

3. **St Georges Walk / Portland Road (Saved Policy WTC4):** This site comprises a variety of established uses including Class B1 offices. Whilst it remains allocated for a mixed use development, the HTCS did not consider that the site offered a realistic opportunity for retail-led development. Securing a comprehensive redevelopment of the site would be complex and is unlikely to be accomplished in the short to medium term. As such, we conclude with the HTCS's findings and do not consider this site to offer a viable opportunity for the proposed foodstore. As such, this site is discounted.

Draft Allocated Sites

- 9.11 In addition to the above, the draft Havant Local Plan Allocations document, which is currently being progressed towards Pre-Submission stage, identifies the following additional sites for consideration:

1. **West of Asda / Bluestar Site (Draft Policy W135):** This site is identified for 100 residential dwelling units and town centre uses. This site was formerly identified in the Havant Borough Local Plan under Policy TC7 and was also assessed in the HTCS.

In the first instance, it is evident that no progress has been made in bring the site forward for development since its allocation and subsequent review within the HTCS. With this in mind, it is considered unlikely that the site will be deliverable in the short to medium term.

It is noted that the site is identified within the HTCS as being 300 metres from the primary shopping frontage in Waterlooville town centre. In terms of accessibility and distance, the site is not sequentially preferable to the application site.

Notwithstanding the above, the site is primarily allocated for residential development, the quantum of which means it will not be possible to accommodate a standalone foodstore with dedicated car parking. The

supporting wording to the draft policy identifies town centre uses at ground floor with residential above. However, the delivery arrangements and operations of the proposed foodstore would conflict with the need to protect residential amenity.

For the reasons set out above, the site is not considered to be available or suitable for accommodation of the proposed foodstore and is therefore discounted.

2. **Asda / Clock Tower Site** (Draft Policy W135): The proposed allocation for this site is residential and town centre uses. To bring forward the envisaged uses, it would be necessary to redevelop the Asda store and reconfigure the site to provide a more efficient use of the land available.

Based on our initial discussions with Asda, the strategy for the future development of this site is unclear and we are not aware of a potential relocation of the existing store. As such, the site has no realistic prospect of delivery in the short to medium term and its redevelopment remains a long term aspiration. Accordingly, the site is unavailable to accommodate the proposed foodstore.

3. **Former Curzon Rooms** (Draft Policy W56): This site has been cleared and is the subject of extant planning permission for 14 residential units (Ref. APP/11/00343). This is matched by the quantum of residential identified in the draft policy for this site.

Raebarn House, situated next to the Curzon Rooms site, whilst potentially offering a development opportunity in the longer term, is currently occupied by the Fabric Warehouse and is therefore unavailable. It is noted that a number of planning permissions have also been granted for uses on its upper floors, including residential, which are understood to have been part implemented.

The unavailability of Raebarn House precludes the possibility of a comprehensive redevelopment coming forward in the short to medium term. This would be necessary in order to accommodate the proposed foodstore. On this basis, the site is discounted.

Leisure Component

- 9.12 The leisure elements of the proposal, namely the cinema, bowling complex, hotel and restaurant / pub uses, are intended to complement each other and are all required to create the critical mass that such development needs to achieve in order to trade successfully. This is reflected in the business models of the respective operators, in determining whether to invest within a particular location.
- 9.13 Clustering such facilities is also necessary in order to create a 'destination' status and ensure the ability to compete with other facilities outside of the catchment area. This is crucial if the current high level of leisure expenditure leakage from the Waterlooville catchment area is to be reversed.
- 9.14 In view of the above, it is necessary to accommodate all such uses on a single site in order for the development to be viable, which would not be achieved if such uses were to be disaggregated.
- 9.13 The findings of the sites assessed in respect of the proposed foodstore element are also applied in discounting them as being sequentially preferable for the leisure component of this proposal. In particular, none of the available sites within Waterlooville town centre are considered to be of a size which could accommodate the quantum and mix of leisure development proposed.
- 9.14 Our assessment concludes that there are no suitable sites which are available to accommodate the proposed development in a sequentially preferable location to the application site. The application site, whilst

edge of centre in terms of distance from the revised town centre boundary, is ideally located to facilitate linkage between the town centre and the emerging West of Waterloo MDA. Its connectivity with the town centre will be improved with the proposed development, ensuring that it is highly accessible.

10.0 LEISURE ASSESSMENT

10.1 This section of the report provides an assessment of the provision of leisure facilities proposed within this application. The proposed development includes the provision of the following leisure uses:

- An 8-Screen Cinema
- A 20-Lane Bowling Complex
- A Health & Fitness (Gymnasium) Centre
- A 60-bed hotel
- 2,370 m² Class A3/A4 use to include a Drive-Thru Restaurant

10.2 This section reviews existing leisure provision within and beyond the Waterlooville catchment area in order to assess the impact of the proposed development in quantitative and qualitative terms.

Existing Leisure Provision

Cinemas

10.3 There are currently no cinema facilities in Waterlooville town centre or indeed within its catchment area. The nearest cinemas are the Odeon at Port Solent (4.5 miles), which offers 6 screens, and Vue at Gunwharf Quays, Portsmouth (7 miles), which offers 14 screens.

10.4 The lack of cinema provision within Waterlooville is reflected in the significant market shares of both the Odeon and Vue cinemas within the catchment area. The household survey which informs the HTCS identifies that 44% of the people living within the Waterlooville catchment area are visiting the Odeon, whilst 35% are visiting the Vue cinema.

10.5 In addition to the above, a small proportion of Waterlooville residents are identified as travelling to cinema facilities in Chichester. In addition, we

estimate that a negligible number will periodically visit the Havant Art Centre in East Street, Havant, which provides a niche cinematic offer.

Bowling Complexes

- 10.6 As with cinema provision, there is also a lack of bowling facilities in the Waterlooville catchment area. The household survey findings of the HTCS identify that the majority of residents in the catchment area (65%) visit the AMF Bowling facility at Havant Retail Park, Bedhampton. The other principal destination for bowling facilities is Portsmouth, which has a market share within the Waterlooville catchment area of just over 11%. Both of these facilities are located outside the catchment area.

Health and Fitness

- 10.7 Waterlooville town centre is served by just two health and fitness facilities, which are the Waterlooville (Horizon) Leisure Centre on Waterberry Drive, and Fitness First at Dukes Walk in the town centre. The household survey findings of the HTCS identify that 21% of residents in the catchment area visit the Fitness First, whilst 32% visit Waterlooville Leisure Centre. Other facilities which draw visits are primarily located beyond the catchment area.

Hotels

- 10.8 Existing hotel provision within Waterlooville is limited and primarily consists of bed and breakfast facilities located outside of the town centre. There is no budget hotel representation within the town centre; the nearest budget hotel is the Premier Inn at Havant Road, Horndean, approximately 2.5 miles away.

Restaurants / Pub Facilities

- 10.9 Waterlooville town centre has representation from a small number of national multiples including McDonalds, Costa and Wetherspoons. These

are complemented by a small number of independent eateries. The household survey findings of the HTCS indicate that Waterlooville town centre retains just 8% of restaurant expenditure generated in the catchment area. This reflects the competing draw of other destinations such as Portsmouth whose market share is 26% within the catchment area.

Impacts

- 10.10 Whilst it is difficult to accurately estimate the quantitative impacts of a leisure development, it is clear that significant leisure expenditure is leaking from the Waterlooville catchment area to facilities beyond. This has been exacerbated in more recent years with the opening of comprehensive leisure facilities at Port Solent and Gunwharf Quays, both of which have established significant market shares within the Waterlooville catchment area. It is expected that these market shares will continue to increase with the development of the West of Waterlooville MDA.
- 10.11 The development of a new leisure-based destination in Waterlooville, which is of a size and format that can successfully compete with the aforementioned facilities, is vital in order reverse the current deficiencies and retain expenditure within the catchment area.
- 10.12 The HTCS has acknowledged the current deficiencies identified above and has indeed identified scope for additional leisure provision, including a cinema facility, within Waterlooville.
- 10.13 The application site presents the only available and suitable site which is capable of accommodating the scale of leisure development required and which is in a readily accessible location with good linkage to Waterlooville town centre.
- 10.14 Given the absence of cinema, bowling and hotel facilities in Waterlooville town centre, the development of such facilities on the application site will serve to enhance its wider retail and leisure offer without adversely

impacting on turnover. Conversely, the accessibility of the application site with the town centre will boost the propensity for linked-trip spend with the town centre's wider retail and leisure offer.

- 10.15 The provision of restaurants and a new public house form vital ancillary elements of the proposed development. This reflects the type of offer that cinema and bowling complex operators require in order to trade successfully. As such, a high proportion of trade drawn to these facilities is expected to come from visitors to the cinema and bowling complexes; this represents expenditure that is currently being lost to ancillary restaurant facilities outside of the catchment area (i.e. Gunwharf Quays, Portsmouth).
- 10.16 It is considered that there is sufficient demand for an additional private health and fitness facility to trade in Waterlooville, thus ensuring more choice for residents living in the catchment area. This also ensures healthy competition within the local area.
- 10.17 In addition to the above, the wider economic impacts of the proposal will see a net increase in employment provision in Waterlooville. Whilst this is explored in further detail within the Planning Statement which supports this application, the proposed development will create a large number of jobs, including those at construction stage, together with associated training opportunities.
- 10.18 In summary, it is considered the proposed leisure development will result in a positive economic impact on Waterlooville and will serve to complement and enhance the existing offer within the town centre.

11.0 SUMMARY AND CONCLUSION

- 11.1 This Retail and Leisure Assessment has been prepared by Harris Lamb on behalf of Bridgehouse Limited, in respect of a mixed use employment, leisure and retail development proposed for the former BAE site, Elettra Avenue, Waterloooville.
- 11.2 The proposed development consists of a Class B1 employment discount foodstore, an 8-screen cinema complex, a 20-lane bowling complex, a 60-bedroom budget hotel, a health and fitness centre, and a range of ancillary restaurant and public house facilities.
- 11.3 The proposal presents the only viable form of development for the former BAE site, following extensive marketing for retained Class B employment uses which have proven unsuccessful. The proposal responds to operator demand to create a high quality leisure-based destination in Waterloooville.
- 11.4 This is the only available site in Waterloooville which is suitable for meeting operator requirements. It presents an accessible location which is well served by transport links and has good connectivity to Waterloooville town centre. The location of the site for viable redevelopment is pivotal to ensuring that the West of Waterloooville Major Development Area is linked with the town centre.
- 11.5 The retail element of the proposal will deliver a much-needed qualitative improvement to the foodstore provision in Waterloooville, ensuring the needs of all residents can be effectively met without the need to make unsustainable journeys to facilities outside of the area. As such, the proposal will deliver a marked improvement in choice and competition within Waterloooville, whilst increasing expenditure retention.
- 11.6 The quantitative impact of the proposed foodstore has been assessed. It has been demonstrated that there will be no significant adverse impact on Waterloooville town centre or other defined centres within the catchment

area. The proposed foodstore will draw the majority of its trade from main stores within and outside the Waterloo catchment area, all which can withstand the impacts identified. Its format as a discounter is designed to complement the wider retail offer typically found within the town centre and will not function as a 'one-stop' shop.

- 11.6 The leisure element of the proposal will deliver much needed cinema, bowling and hotel facilities to the area, whose current deficiencies mean that expenditure and related investment is being lost to competing facilities outside of Waterloo. The development of these facilities, as part of an enhanced eating and drinking offer, will create a new leisure destination in Waterloo which will be capable to drawing back expenditure which is currently leaking from the area.
- 11.7 The proposal will positively impact upon Waterloo, both in terms of improving its existing retail and leisure offer, and in bolstering the local economy through increase expenditure retention, spin-off benefits, and job creation. Accordingly, the proposal is compliant in planning policy terms.

APPENDIX 1

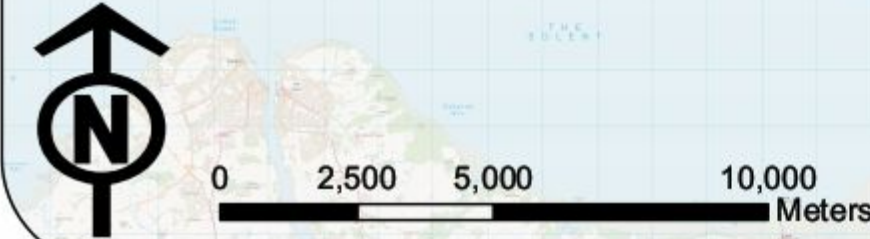
Study Area and Shopping Provision Plan

Key

- Convenience Stores
- Supermarket Chains
- Elettra Avenue, Waterloooville
- Study Area

Stores

- ID, Address
- 1, Asda, Maurepas Way, Waterloooville
 - 2, Waitrose, Dukes Walk, Waterloooville
 - 3, Iceland, Wellington Way Precinct, Waterloooville
 - 4, Lidl, London Road, Cowplain
 - 5, Co-op, London Road, Cowplain
 - 6, Co-op, Hambledon Road, Denmead
 - 7, Co-op, Cornwall Buildings, London Road
 - 8, Co-op, Stakes Road, Purbrook
 - 9, Co-op, Milton Road, Waterloooville
 - 10, Tesco Express, Tempest Road, Waterloooville
 - 11, Asda Larchwood Avenue, Bedhampton
 - 12, Tesco Solent Road, Havant
 - 13, Morrisons, Lakesmere Road, Horndean
 - 14, Sainsbury's, Fitzherbert Road, Farlington
 - 15, Tesco Extra, North Harbour, Portsmouth
 - 16, Waitrose, North Street, Havant
 - 17, Tesco Metro, High Street, Cosham
 - 18, Tesco Extra, Fishpool Road, Chichester
 - 19, Aldi, Central Retail Park, Park Way, Havant
 - 20, Netto, Park Parade, Leigh Park, Havant
 - 21, Sainsbury's, Wallington Way, Broadcut, Fareham
 - 22, Tesco, Clement Attlee Way, Port Solent
 - 23, Morrisons, Eastern Road, Portsmouth
 - 24, Waitrose, Rams Walk, Petersfield
 - 25, Sainsbury's, Commercial Road, Portsmouth
 - 26, Tesco, Crasswell Street, Portsmouth
 - 27, Co-op, The Square, Wickham
 - 28, Co-op, Middle Park Way, Leigh Park, Havant
 - 29, Tesco, Fareham Whiteley, Fareham
 - 30, Marks and Spencer, Tollbar Way, Hedge End, Southampton
 - 31, Costcutter, Milton Road, Cowplain
 - 32, Marks and Spencer, East Street, Chichester
 - 33, One Stop, Mill Road, Waterloooville
 - 34, Aldi, West Street, Fareham
 - 35, Co-op, Catherington Lane, Horndean



APPENDIX 2

APPENDIX 3



Legend

- A1 Retail (Convenience)
- A1 Retail (Comparison)
- A1 Retail

- A2 - Financial / Professional
- A3, A4, A5 - Food And Drink
- B1 - Business

- B2 - Industrial
- D2 - Assembly and Leisure
- D1 - Non Residential Institution
- Vacant

65 metres

APPENDIX 4

Proposed Aldi, Elettra Avenue, Waterloooville - Retail Impact Tables

Table 1. Study Area Population						
	2013	2014	2015	2016	2017	2018
Zone 7 (PO7 5)	10,625	10,735	10,804	10,876	10,868	10,901
Zone 8 (PO7 8)	8,770	8,766	8,882	8,965	9,000	9,068
Zone 9 (PO7 7)	8,638	8,739	8,763	8,780	8,800	8,836
Zone 10 (PO8 8)	10,155	10,231	10,233	10,285	10,312	10,330
Zone 11 (PO7 6)	10,085	10,079	10,091	11,580	11,582	11,573
Total	48,273	48,550	48,773	50,486	50,562	50,708

Source:

1. Experian Micromarketer Report 2013
2. ONS Mid-Year Estimates
3. Allowance made for population growth in West of Waterloooville MDA based on 2.3 persons per household

Table 2a. Per Capita Expenditure (Convenience Goods)						
	2013	2014	2015	2016	2017	2018
Zone 7 (PO7 5)	£1,982	£1,978	£1,986	£1,994	£2,002	£2,007
Zone 8 (PO7 8)	£1,859	£1,855	£1,863	£1,870	£1,877	£1,883
Zone 9 (PO7 7)	£1,930	£1,926	£1,934	£1,941	£1,949	£1,954
Zone 10 (PO8 8)	£1,869	£1,866	£1,873	£1,880	£1,888	£1,893
Zone 11 (PO7 6)	£1,901	£1,897	£1,904	£1,912	£1,919	£1,925
Growth Rate	1.80%	2.40%	2.90%	2.90%	2.90%	2.90%
SFT Rate	2.30%	2.50%	2.70%	2.90%	3.10%	3.40%

Table 2b. Per Capita Expenditure (Comparison Goods)						
	2013	2014	2015	2016	2017	2018
Zone 7 (PO7 5)	£2,887	£2,930	£2,991	£3,053	£3,116	£3,181
Zone 8 (PO7 8)	£2,614	£2,652	£2,708	£2,764	£2,821	£2,880
Zone 9 (PO7 7)	£2,688	£2,728	£2,785	£2,843	£2,902	£2,962
Zone 10 (PO8 8)	£2,694	£2,734	£2,791	£2,849	£2,908	£2,968
Zone 11 (PO7 6)	£2,878	£2,921	£2,982	£3,044	£3,107	£3,171
Growth Rate	-0.10%	0.00%	0.60%	0.60%	0.60%	0.60%
SFT Rate	10.70%	11.50%	12.20%	12.90%	13.60%	14.30%

Source:

1. Expenditure estimates at 2012 from Experian Micromarketer Report 2013
2. Annual growth rates derived from Experian Retail Planner Briefing Note 10.1 (Figure 1a)
3. Excludes Special Forms of Trading (adjusted to exclude sales from stores) derived from Experian Retail Planner Briefing Note 10.1 (Appendix 3)
4. 2011 Prices

Table 3a. Total Available Expenditure (Convenience Goods)						
	2013	2014	2015	2016	2017	2018
	£m	£m	£m	£m	£m	£m
Zone 7 (PO7 5)	£21.06	£21.24	£21.46	£21.68	£21.75	£21.88
Zone 8 (PO7 8)	£16.31	£16.26	£16.54	£16.77	£16.90	£17.07
Zone 9 (PO7 7)	£16.67	£16.83	£16.94	£17.04	£17.15	£17.27
Zone 10 (PO8 8)	£18.98	£19.09	£19.16	£19.34	£19.46	£19.56
Zone 11 (PO7 6)	£19.17	£19.12	£19.21	£22.14	£22.23	£22.27
Total	£92.19	£92.53	£93.32	£96.97	£97.49	£98.05

Table 3b. Total Available Expenditure (Comparison Goods)						
	2013	2014	2015	2016	2017	2018
	£m	£m	£m	£m	£m	£m
Zone 7 (PO7 5)	£30.67	£31.45	£32.31	£33.20	£33.87	£34.67
Zone 8 (PO7 8)	£22.92	£23.25	£24.05	£24.78	£25.39	£26.11
Zone 9 (PO7 7)	£23.22	£23.84	£24.40	£24.96	£25.53	£26.17
Zone 10 (PO8 8)	£27.36	£27.97	£28.56	£29.30	£29.99	£30.66
Zone 11 (PO7 6)	£29.03	£29.44	£30.09	£35.25	£35.99	£36.70
Total	£133.20	£135.95	£139.42	£147.49	£150.77	£154.32

Source:

1. Tables 1 and 2a

2. Tables 1 and 2b

Table 4. Benchmark Turnovers

	Net Sales Area		Convenience Footspace		Convenience Goods Sales Density (2011 Prices)		Total Convenience Turnover	Trade from Study Area	Convenience Goods Turnover from Study Area	Comparison Footspace	Comparison Goods Sales Density (2011 Prices)	Total Comparison Turnover	Total Comparison Turnover (2016)	Trade from Study Area	Comparison Goods Turnover from Study Area	Total Turnover	Total Turnover from Study Area
Within Study Area	(sq m)	% of Net	(sq m)	(£ per sq m)	(£m)	(%)	(£m)	(£m)	(£m)	% of Net	(sq m)	(£ per sq m)	(£m)	(%)	(£m)	(£m)	(£m)
Aldi, Maunpys Way, Waterlooville	3285	1	70%	2,300	£13,450	5	£3093	70%	£21.65	30%	986	£8,898	5	£8.77	£8.95	£3970	£28.23
Waitrose, Dukes Walk, Waterlooville	1289	2	88%	2,034	£11,877	5	£2392	55%	£13.36	10%	229	£7,241	5	£8.66	£1.69	£2558	£14.40
Iceland, Wellington Way Precinct, Waterlooville	465	2	92%	428	£7,039	5	£9.01	90%	£2.71	95%	442	£8,880	5	£9.92	£4.01	£6.99	£6.44
Other local stores, Waterlooville Town Centre	9443	3	6%	602	£3,500	2	£2.11	90%	£1.89	94%	8,841	£4,237	6	£37.46	£38.24	£3956	£35.61
Waterlooville Town Centre Total	5,482		5,348				£59.97		£39.41		10,497		£51.81	£52.89	£45.26	£111.78	£84.67
Lidl London Road, Cowplain	892	1	80%	714	£3,614	5	£2.58	70%	£1.81	20%	178	£1,607	5	£0.29	£0.29	£2.87	£2.01
Co-op, London Road, Cowplain	278	1	95%	264	£8,005	5	£2.11	80%	£1.69	5%	14	£3,874	5	£0.05	£0.05	£2.17	£1.73
Other Local Shops, Cowplain District Centre	700	1	100%	700	£3,500	2	£2.45	90%	£2.21	0%	0	£4,000	2	£0.00	£0.00	£2.45	£2.21
Cowplain District Centre Total	1,870		1,678				£7.14		£5.70		192		£0.34	£0.35	£0.24	£7.48	£5.95
Co-op, Hambledon Road, Denmead	379	4	98%	371	£8,005	5	£2.97	70%	£2.08	2%	7	£3,874	5	£0.03	£0.03	£3.00	£2.11
Other Local Shops, Denmead Local Centre	372	4	25%	92	£3,000	2	£0.28	85%	£0.23	75%	280	£3,500	2	£0.98	£1.00	£1.26	£0.23
Denmead Local Centre Total	751		463				£3.25		£2.32		287		£1.01	£1.08	£0.03	£4.26	£2.34
Other	621		590				£5.39		£5.12		31		£0.20	£0.21	£0.19	£5.59	£5.31
Total in Study Area	18,724		8,074				£75.75		£52.55		11,007		£53.36	£54.48	£45.72	£129.11	£98.27

Source:

1. Havant Town Centre, Retail & Leisure Study 2009

2. Harris Lamb Assumption

3. GOMD

4. Winchester Retail Study Update 2012

5. Verdett 2012

6. Retail Rankings 2012

Table 5. Turnover of Proposed Aldi					
	Net Floorspace	Total Turnover at	Turnover from Study	Total Turnover at	Turnover from Study
	(Sq m)	2016	Area at 2016	2018	Area at 2018
		£m	£m	£m	£m
Convenience	900	£7.65	£6.50	£7.66	£6.51
Comparison	225	£0.67	£0.57	£0.70	£0.59
Total	1,125	£8.32	£7.07	£8.36	£7.10

Source

1. Convenience floorspace efficiency	100.10%
2. Comparison floorspace efficiency	102.10%
3. Convenience turnover from Study Area	85%
3. Comparison turnover from Study Area	85%

Table 6. Turnover of Commitments					
	Net Floorspace	Total Turnover	Turnover from	Total Turnover	Turnover from Study
	(Sq m)	at 2016	Study Area at 2016	at 2018	Area at 2018
		£m	£m	£m	£m
Sainsbury's, Hambledon Road					
Convenience	2,806	£35.35	£28.28	£35.42	£28.34
Comparison	1,382	£10.66	£8.53	£10.88	£8.71
Total	4,188	£46.01	£36.81	£46.30	£37.04
Unit 6, Wellington Retail Park					
Convenience	878	£8.79	£7.91	£8.81	£7.93
Comparison	0	£0.00	£0.00	£0.00	£0.00
Total	878	£8.79	£7.91	£8.81	£7.93

Source

1. Convenience floorspace efficiency	100.10%
2. Comparison floorspace efficiency	102.10%
3. Convenience turnover from SA (Sainsbury's)	80%
4. Comparison turnover from SA (Sainsbury's)	80%
5. Convenience turnover from SA (Unit 6)	90%

Table 7. Distribution of Convenience Goods Expenditure by Zone (Base Year 2013)								
	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Study Area Total	Inflow	Total
	£m	£m	£m	£m	£m	£m	£m	£m
Total Expenditure	£21.06	£16.31	£16.67	£18.98	£19.17	£92.19		
Main Food	£14.74	£11.41	£11.67	£13.29	£13.42	£64.53		
Top-Up	£6.32	£4.89	£5.00	£5.69	£5.75	£27.66		
Store / Centre								
Asda, Maurepas Way, Waterloooville	£3.00	£3.71	£4.87	£2.76	£7.41	£21.75	£9.32	£31.07
Waitrose, Dukes Walk, Waterloooville	£1.19	£0.27	£2.13	£2.35	£1.23	£7.19	£5.88	£13.07
Iceland, Wellington Way Precinct, Waterloooville	£0.33	£0.04	£0.82	£0.12	£0.34	£1.67	£0.19	£1.85
Other local stores, Waterloooville Town Centre	£0.34	£0.55	£0.79	£0.00	£0.00	£1.68	£0.19	£1.86
Waterloooville Town Centre Total	£4.86	£4.58	£8.62	£5.24	£8.98	£32.28	£15.57	£47.85
Lidl, London Road, Cowplain	£0.15	£0.43	£0.14	£1.68	£0.27	£2.66	£1.14	£3.80
Co-op, London Road, Cowplain	£0.45	£0.00	£0.14	£1.87	£0.00	£2.45	£0.61	£3.06
Other Local Shops, Cowplain District Centre	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50	£0.06	£0.55
Cowplain District Centre Total	£0.59	£0.43	£0.27	£4.05	£0.27	£5.61	£1.81	£7.42
Co-op, Hambledon Road, Denmead	£0.15	£0.00	£0.00	£0.00	£2.50	£2.65	£1.13	£3.78
Other Local Shops, Denmead Local Centre	£0.00	£0.00	£0.00	£0.00	£0.34	£0.34	£0.06	£0.40
Denmead Local Centre Total	£0.15	£0.00	£0.00	£0.00	£2.84	£2.98	£1.19	£4.18
Other	£1.49	£1.64	£0.41	£0.64	£0.14	£4.31	£0.23	£4.53
Total Within Study Area	£7.09	£6.64	£9.29	£9.92	£12.23	£45.18	£18.80	£63.98
Asda Larchwood Avenue, Bedhampton	£7.62	£4.98	£2.80	£2.66	£1.10	£19.16	£28.73	£47.89
Tesco Solent Road, Havant	£1.75	£1.40	£0.26	£0.27	£0.00	£3.68	£33.13	£36.82
Morrisons, Lakesmere Road, Horndean	£0.50	£1.12	£2.79	£4.44	£4.25	£13.11	£13.11	£26.21
Other	£4.10	£2.15	£1.53	£1.70	£1.59	£11.07		
Total Outside of Study Area	£13.97	£9.66	£7.38	£9.06	£6.94	£47.01		
Overall Total	£21.06	£16.31	£16.67	£18.99	£19.17	£92.19		
Trade Retention	34%	41%	56%	52%	64%	49%		
Trade Leakage	66%	59%	44%	48%	36%	51%		

Table 8. Distribution of Convenience Goods Expenditure by Zone (Design Year 2016)								
	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Study Area Total	Inflow	Total
	£m	£m	£m	£m	£m	£m	£m	£m
Total Expenditure	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Main Food	£15.18	£11.74	£11.93	£13.54	£15.50	£67.88		
Top-Up	£6.51	£5.03	£5.11	£5.80	£6.64	£29.09		
Store / Centre								
Asda, Maurepas Way, Waterlooville	£3.09	£3.82	£4.98	£2.81	£8.55	£23.25	£9.96	£33.21
Waitrose, Dukes Walk, Waterlooville	£1.23	£0.28	£2.18	£2.40	£1.43	£7.51	£6.15	£13.66
Iceland, Wellington Way Precinct, Waterlooville	£0.34	£0.04	£0.84	£0.13	£0.40	£1.75	£0.19	£1.95
Other local stores, Waterlooville Town Centre	£0.35	£0.57	£0.81	£0.00	£0.00	£1.72	£0.19	£1.91
Waterlooville Town Centre Total	£5.00	£4.71	£8.81	£5.34	£10.38	£34.24	£16.50	£50.73
Lidl, London Road, Cowplain	£0.15	£0.44	£0.14	£1.71	£0.32	£2.76	£1.18	£3.94
Co-op, London Road, Cowplain	£0.46	£0.00	£0.14	£1.90	£0.00	£2.50	£0.63	£3.13
Other Local Shops, Cowplain District Centre	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50	£0.06	£0.56
Cowplain District Centre Total	£0.61	£0.44	£0.28	£4.12	£0.32	£5.76	£1.86	£7.63
Co-op, Hambledon Road, Denmead	£0.15	£0.00	£0.00	£0.00	£2.89	£3.04	£1.30	£4.34
Other Local Shops, Denmead Local Centre	£0.00	£0.00	£0.00	£0.00	£0.39	£0.39	£0.07	£0.46
Denmead Local Centre Total	£0.15	£0.00	£0.00	£0.00	£3.28	£3.43	£1.37	£4.80
Other	£1.54	£1.68	£0.41	£0.65	£0.16	£4.44	£0.23	£4.67
Total Within Study Area	£7.30	£6.83	£9.50	£10.11	£14.13	£47.86	£19.96	£67.83
Asda Larchwood Avenue, Bedhampton	£7.85	£5.12	£2.86	£2.71	£1.26	£19.80	£29.71	£49.51
Tesco Solent Road, Havant	£1.80	£1.44	£0.27	£0.27	£0.00	£3.78	£34.05	£37.84
Morrisons, Lakesmere Road, Hordean	£0.52	£1.16	£2.85	£4.53	£4.91	£13.96	£13.96	£27.91
Other	£4.22	£2.21	£1.56	£1.73	£1.84	£11.56		
Total Outside of Study Area	£14.39	£9.93	£7.54	£9.23	£8.01	£49.11		
Overall Total	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Trade Retention	34%	41%	56%	52%	64%	49%		
Trade Leakage	66%	59%	44%	48%	36%	51%		

Table 9. Distribution of Convenience Goods Expenditure by Zone (Design Year 2016) - With Aldi								
	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Study Area Total	Inflow	Total
	£m	£m	£m	£m	£m	£m	£m	£m
Total Expenditure	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Main Food	£15.18	£11.74	£11.93	£13.54	£15.50	£67.88		
Top-Up	£6.51	£5.03	£5.11	£5.80	£6.64	£29.09		
Store / Centre								
Asda, Maurepas Way, Waterloooville	£2.83	£3.43	£3.90	£2.43	£7.81	£20.40	£9.96	£30.37
Waitrose, Dukes Walk, Waterloooville	£1.21	£0.27	£2.08	£2.33	£1.34	£7.25	£6.15	£13.39
Iceland, Wellington Way Precinct, Waterloooville	£0.34	£0.04	£0.80	£0.13	£0.40	£1.71	£0.19	£1.90
Other local stores, Waterloooville Town Centre	£0.34	£0.55	£0.77	£0.00	£0.00	£1.66	£0.19	£1.85
Waterloooville Town Centre Total	£4.72	£4.29	£7.56	£4.89	£9.55	£31.01	£16.50	£47.51
Lidl, London Road, Cowplain	£0.13	£0.34	£0.02	£1.31	£0.15	£1.96	£1.18	£3.14
Co-op, London Road, Cowplain	£0.45	£0.00	£0.14	£1.90	£0.00	£2.50	£0.63	£3.12
Other Local Shops, Cowplain District Centre	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50	£0.06	£0.56
Cowplain District Centre Total	£0.58	£0.34	£0.16	£3.72	£0.15	£4.96	£1.86	£6.82
Co-op, Hambledon Road, Denmead	£0.15	£0.00	£0.00	£0.00	£2.64	£2.79	£1.30	£4.10
Other Local Shops, Denmead Local Centre	£0.00	£0.00	£0.00	£0.00	£0.37	£0.37	£0.07	£0.44
Denmead Local Centre Total	£0.15	£0.00	£0.00	£0.00	£3.02	£3.17	£1.37	£4.54
Other	£1.54	£1.66	£0.41	£0.65	£0.16	£4.42	£0.23	£4.65
Proposed Aldi, Eletttra Avenue, Waterloooville	£0.65	£0.97	£1.95	£1.30	£1.62	£6.50	£1.15	£7.65
Total Within Study Area	£7.64	£7.27	£10.09	£10.56	£14.50	£50.05	£21.11	£71.16
Asda Larchwood Avenue, Bedhampton	£7.62	£4.88	£2.67	£2.58	£1.26	£19.01	£29.71	£48.72
Tesco Solent Road, Havant	£1.73	£1.39	£0.27	£0.27	£0.00	£3.66	£34.05	£37.71
Morrisons, Lakesmere Road, Hordean	£0.48	£1.06	£2.56	£4.20	£4.53	£12.84	£13.96	£26.79
Other	£4.22	£2.16	£1.47	£1.73	£1.84	£11.42		
Total Outside of Study Area	£14.05	£9.50	£6.96	£8.78	£7.64	£46.92		
Overall Total	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Trade Retention	35%	43%	59%	55%	66%	52%		
Trade Leakage	65%	57%	41%	45%	35%	48%		

Table 10. Distribution of Convenience Goods Expenditure by Zone (Design Year 2016) - With Aldi and Commitments								
	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Study Area Total	Inflow	Total
	£m	£m	£m	£m	£m	£m	£m	£m
Total Expenditure	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Main Food	£15.18	£11.74	£11.93	£13.54	£15.50	£67.88		
Top-Up	£6.51	£5.03	£5.11	£5.80	£6.64	£29.09		
Store / Centre								
Asda, Maurepas Way, Waterlooville	£2.37	£2.47	£1.78	£1.50	£5.80	£13.92	£9.96	£23.89
Waitrose, Dukes Walk, Waterlooville	£0.99	£0.17	£1.14	£1.46	£0.44	£4.20	£6.15	£10.35
Iceland, Wellington Way Precinct, Waterlooville	£0.29	£0.04	£0.71	£0.13	£0.40	£1.56	£0.19	£1.76
Other local stores, Waterlooville Town Centre	£0.29	£0.49	£0.68	£0.00	£0.00	£1.46	£0.19	£1.65
Sainsbury's, Salvador Caetano Site, Waterlooville	£4.08	£3.84	£6.20	£5.10	£6.28	£25.49	£7.07	£32.56
Unit 6, Wellington Retail Park, Waterlooville	£0.76	£1.14	£2.28	£1.54	£1.90	£7.61	£0.88	£8.49
Waterlooville Town Centre Total	£8.77	£8.16	£12.78	£9.73	£14.82	£54.25	£24.44	£78.70
Lidl, London Road, Cowplain	£0.13	£0.34	£0.02	£1.29	£0.15	£1.94	£1.18	£3.12
Co-op, London Road, Cowplain	£0.44	£0.00	£0.14	£1.90	£0.00	£2.48	£0.63	£3.11
Other Local Shops, Cowplain District Centre	£0.00	£0.00	£0.00	£0.50	£0.00	£0.50	£0.06	£0.56
Cowplain District Centre Total	£0.57	£0.34	£0.16	£3.70	£0.15	£4.93	£1.86	£6.79
Co-op, Hambledon Road, Denmead	£0.15	£0.00	£0.00	£0.00	£2.64	£2.79	£1.30	£4.10
Other Local Shops, Denmead Local Centre	£0.00	£0.00	£0.00	£0.00	£0.37	£0.37	£0.07	£0.44
Denmead Local Centre Total	£0.15	£0.00	£0.00	£0.00	£3.02	£3.17	£1.37	£4.54
Other	£1.43	£1.55	£0.41	£0.65	£0.16	£4.21	£0.23	£4.45
Proposed Aldi, Elettra Avenue, Waterlooville	£0.65	£0.97	£1.95	£1.30	£1.62	£6.50	£1.15	£7.65
Total Within Study Area	£10.92	£10.06	£13.35	£14.08	£18.15	£66.55	£27.91	
Asda Larchwood Avenue, Bedhampton	£5.77	£3.01	£0.19	£0.49	£0.11	£9.56	£29.71	£39.27
Tesco Solent Road, Havant	£1.22	£0.83	£0.06	£0.27	£0.00	£2.38	£34.05	£36.43
Morrisons, Lakesmere Road, Horndean	£0.15	£0.43	£0.43	£1.70	£1.10	£3.82	£13.96	£17.77
Other	£2.96	£1.47	£1.07	£1.50	£1.17	£8.16		
Total Outside of Study Area	£10.11	£5.73	£1.74	£3.96	£2.37	£23.91		
Overall Total	£21.68	£16.77	£17.04	£19.34	£22.14	£96.97		
Trade Retention	50.4%	60.0%	78.3%	72.8%	82.0%	68.6%		
Trade Leakage	46.6%	34.2%	10.2%	20.5%	10.7%	24.7%		

Table 11. Impact with Aldi												
Store / Centre	Convenience					Comparison					Total Trade Diversion to Aldi (2016)	Solus Impact of Aldi (2016)
	2013	2016	Diversion to Aldi		Turnover with Aldi (2016)	2013 Turnover	2016 Turnover	Diversion to Aldi		Turnover with Aldi (2016)		
	£m	£m	%	£m	£m	£m	£m	%	£m	£m	£m	%
Asda, Maunpys Way, Waterlooville	£31.07	£33.21	8.6%	£2.85	£30.37	£8.77	£8.95	1.5%	£0.13	£8.82	-£2.98	-7.1%
Waitrose, Dukes Walk, Waterlooville	£13.07	£13.66	2.0%	£0.27	£13.39	£1.66	£1.69	0.0%	£0.00	£1.69	-£0.27	-1.7%
Iceland, Wellington Way Precinct, Waterlooville	£1.85	£1.95	2.3%	£0.05	£1.90	£3.92	£4.01	0.0%	£0.00	£4.01	-£0.05	-0.8%
Other local stores, Waterlooville Town Centre	£1.86	£1.91	3.4%	£0.06	£1.85	£37.46	£38.24	0.3%	£0.10	£38.14	-£0.17	-0.4%
Waterlooville Town Centre Total	£47.85	£50.73	6.4%	£3.22	£47.51	£51.81	£52.89	0.4%	£0.23	£52.66	-£3.46	-3.3%
Lidl, London Road, Cowplain	£3.80	£3.94	20.3%	£0.80	£3.14	£0.29	£0.29	22.9%	£0.07	£0.23	-£0.87	-20.5%
Co-op, London Road, Cowplain	£3.06	£3.13	0.2%	£0.01	£3.12	£0.05	£0.05	0.0%	£0.00	£0.05	-£0.01	-0.2%
Other Local Shops, Cowplain District Centre	£0.55	£0.56	0.0%	£0.00	£0.56	£2.37	£2.42	0.0%	£0.00	£2.42	£0.00	0.0%
Cowplain District Centre Total	£7.42	£7.63	10.6%	£0.81	£6.82	£2.71	£2.77	2.4%	£0.07	£2.70	-£0.87	-8.4%
Co-op, Hambledon Road, Denmead	£3.78	£4.34	5.6%	£0.24	£4.10	£0.03	£0.03	0.0%	£0.00	£0.03	-£0.24	-5.6%
Other Local Shops, Denmead Local Centre	£0.40	£0.46	3.6%	£0.02	£0.44	£0.98	£1.00	0.0%	£0.00	£1.00	-£0.02	-1.1%
Denmead Local Centre Total	£4.18	£4.80	5.4%	£0.26	£4.54	£1.01	£1.03	0.0%	£0.00	£1.03	-£0.26	-4.5%
Other	£4.53	£4.67	0.4%	£0.02	£4.65	£0.20	£0.21	32.2%	£0.07	£0.21	-£0.02	-0.4%
Aldi, Eletttra Avenue, Waterlooville					£7.65					£0.67		
Total Trade Diversion from Study Area				£4.31					£0.37		-£4.61	
Asda Larchwood Avenue, Bedhampton	£47.89	£49.51	1.6%	£0.80	£48.72	£40.83	£41.69	0.2%	£0.07	£41.62	-£0.86	-0.9%
Tesco Solent Road, Havant	£36.82	£37.84	0.3%	£0.13	£37.71	£4.00	£4.09	0.2%	£0.01	£4.08	-£0.13	-0.3%
Morrisons, Lakesmere Road, Horn dean	£26.21	£27.91	4.0%	£1.12	£26.79	£4.46	£4.56	1.8%	£0.08	£4.48	-£1.20	-3.7%
Other				£0.15					£0.05		-£0.19	
Total Trade Diversion from Outside of Study Area				£2.19					£0.20		-£2.39	
Inflow				£1.15					£0.10			
Store Turnover				£7.65					£0.67			

	Convenience											Comparison											Total Trade Diversion (2016)	Cumulative Impact (2016)
	2013	2016	Diversion to Sainsbury's	Turn over with Sainsbury's (2016)	Diversion to Unit 6	Turn over with Unit 6 (2016)	Diversion to Aldi	Turn over with Aldi and Commitments (2016)	2013	2016	Diversion to Sainsbury's	Turn over with Sainsbury's (2016)	Diversion to Aldi	Turn over with Aldi and Commitments (2016)										
Stores / Centres	£m	£m	%	£m	£m	%	£m	£m	%	£m	£m	£m	£m	%	£m	£m								
Aldi, Marnes Way, Watlingtonville	£31.07	£33.21	16.5%	£5.49	£27.73	6.2%	£2.05	£25.67	5.4%	£1.79	£23.89	£8.77	£8.95	17.9%	£1.60	£7.25								
Waitrose, Dukes Walk, Watlingtonville	£13.07	£13.66	17.5%	£2.39	£11.27	4.8%	£0.65	£10.62	2.0%	£0.27	£10.35	£1.66	£1.69	12.6%	£0.21	£1.48								
Local and, Watlington Way Precinct, Watlingtonville	£1.85	£1.95	5.8%	£0.11	£1.84	1.6%	£0.03	£1.80	2.3%	£0.05	£1.76	£3.92	£4.01	0.0%	£0.00	£4.01								
Other local stores, Watlingtonville Town Centre	£1.86	£1.91	8.1%	£0.16	£1.76	2.3%	£0.04	£1.71	3.4%	£0.06	£1.65	£37.46	£38.24	2.8%	£1.07	£37.08								
Sainsbury's, Salvador Caruso Site, Watlingtonville					£36.35	5.7%	£2.02	£33.32	2.2%	£0.76	£32.56				£10.66	0.3%								
Unit 6, Watlington Retail Park, Watlingtonville								£6.79	3.4%	£0.30	£6.49					£10.63								
Watlingtonville Town Centre Total	£47.85	£50.73	16.1%	£8.14	£77.94		£4.81	£81.92	3.9%	£3.22	£78.70	£51.81	£52.89	5.4%	£2.88	£50.44								
Ud, London Road, Cowplains	£3.80	£3.94	0.4%	£0.01	£3.92	0.1%	£0.00	£3.92	20.3%	£0.80	£3.12	£0.29	£0.29	0.0%	£0.00	£0.29								
Co-op, London Road, Cowplains	£3.06	£3.13	0.3%	£0.01	£3.12	0.1%	£0.00	£3.11	0.2%	£0.01	£3.11	£0.05	£0.05	0.0%	£0.00	£0.05								
Other Local Shops, Cowplains District Centre	£0.55	£0.56	0.0%	£0.00	£0.56	0.0%	£0.00	£0.56	0.0%	£0.00	£0.56	£0.00	£0.00	0.0%	£0.00	£0.00								
Cowplains District Centre Total	£7.42	£7.63	0.3%	£0.02	£7.60	0.1%	£0.01	£7.59	10.6%	£0.81	£6.79	£0.34	£0.35	0.0%	£0.00	£0.35								
Co-op, Hembleton Road, Denmesd	£3.78	£4.34	0.0%	£0.00	£4.34	0.0%	£0.00	£4.34	5.0%	£0.24	£4.10	£0.03	£0.03	0.0%	£0.00	£0.03								
Other Local Shops, Denmesd Local Centre	£0.40	£0.46	0.0%	£0.00	£0.46	0.0%	£0.00	£0.46	3.0%	£0.02	£0.44	£0.98	£1.00	0.0%	£0.00	£1.00								
Denmesd Local Centre Total	£4.18	£4.80	0.0%	£0.00	£4.80	0.0%	£0.00	£4.80	5.4%	£0.26	£4.54	£1.01	£1.03	0.0%	£0.00	£1.03								
Other Total	£4.53	£4.67	3.6%	£0.17	£4.50	0.8%	£0.04	£4.47	0.4%	£0.02	£4.45	£0.20	£0.21		£0.11	£0.27								
Aldi, Elstree Avenue, Watlingtonville											£7.65					£0.67								
Total Trade Diversion from Study Area				£8.34		£4.85		£4.31						£2.98		£0.37								
Aldi Larchwood Avenue, Hembleton	£47.89	£49.51	17.5%	£8.67	£40.84	1.8%	£0.87	£39.97	1.4%	£0.70	£39.27	£40.83	£41.69	6.4%	£2.66	£39.03								
Waitrose Solent Road, Havant	£36.82	£37.84	2.8%	£1.06	£36.78	0.6%	£0.22	£36.56	0.3%	£0.13	£36.43	£4.00	£4.09	13.0%	£0.53	£3.55								
Morrisons, Lakesmead Road, Hymersley	£26.21	£27.91	26.8%	£7.49	£20.42	5.1%	£1.43	£18.99	4.4%	£1.22	£17.77	£4.46	£4.56	35.1%	£1.60	£2.96								
Other				£2.71		£0.55		£0.15							£0.75	£0.03								
Total Trade Diversion from Outside of Study Area				£19.94		£3.07		£2.19						£5.54		£0.20								
Inflow				£7.07		£0.88		£1.15						£2.13		£0.10								
Stores To move r				£35.35		£8.79		£7.65						£10.66		£0.67								