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Table 1: Potential Turnover of Proposed Development

Floorspace	Net Sales Area (Sq m)	Sales Density (£ / Sq m)	Turnover (£/Sq m)
	[1]	**[2]**	**[3]**
Convenience Goods	2,806	9,661	27.1
Comparison Goods	1382	7,646	10.6
Total	**4,188**		**37.7**

Notes
[1] Net floorspace from planning application drawings
[2] Sales densities are Sainsbury's benchmark sales densities taken from Verdict Grocery Retailers January 2009
[3] = [1] X [2]

2008 Prices

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Table 2: Population in the Study Area

Zone	2010	2012	2017
PO7 7	8,521	8,629	8850
PO7 8	8,578	8,809	9267
PO7 5	10,550	10,725	11090
PO8 8	9,578	9,677	9949

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Table 3A: Convenience Expenditure Per Capita in the Study Area

Zone	2010	2012	2017
PO7 7	1,925	1,933	2,013
PO7 8	1,894	1,902	1,981
PO7 5	1,954	1,962	2,044
PO8 8	1,913	1,921	2,001

2008 Prices

Table 3B: Comparison Expenditure Per Capita in the Study Area

Zone	2010	2012	2017
PO7 7	2,993	3,014	3,420
PO7 8	3,096	3,118	3,538
PO7 5	3,247	3,270	3,710
PO8 8	3,175	3,197	3,628

2008 Prices

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Table 4A: Available Convenience Expenditure within the Study Area

Zone	2010	2012	2017	Growth 2010 - 2012 (£m)	Growth 2010 - 2012 %	Growth 2010 - 2017 (£m)	Growth 2010 - 2017 %
PO7 7	16.4	16.7	17.8	0.3	1.7	1.4	8.6
PO7 8	16.2	16.8	18.4	0.5	3.1	2.1	13.0
PO7 5	20.6	21.0	22.7	0.4	2.1	2.0	9.9
PO8 8	18.3	18.6	19.9	0.3	1.4	1.6	8.6
Total	**71.6**	**73.1**	**78.7**	**1.5**	**2.0**	**7.2**	**10.0**

Notes
Total available expenditure = expenditure per capita (table 3) x population (table 2).

2008 Prices

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Table 4B: Available Comparison Expenditure within the Study Area

Zone	2010	2012	2017	Growth 2010 - 2012 (£m)	Growth 2010 - 2012 %	Growth 2010 - 2017 (£m)	Growth 2010 - 2017 %
PO7 7	25.5	26.0	30.3	0.5	2.0	4.8	18.7
PO7 8	26.6	27.5	32.8	0.9	3.4	6.2	23.4
PO7 5	34.3	35.1	41.1	0.8	2.4	6.9	20.1
PO8 8	30.4	30.9	36.1	0.5	1.7	5.7	18.7
Total	**116.7**	**119.5**	**140.3**	**2.7**	**2.4**	**23.6**	**20.2**

Notes
Total available expenditure = expenditure per capita (table 3) x population (table 2).

2008 Prices

NOTES TO TABLE AND TOTAL TURNOVERS UPDATED

Table 5A: Turnover of Existing Convenience Facilities in Havant Borough West

Store	Total Net Sales Area (sq m)	Total Net Convenience Sales Area (sq m)	Benchmark Sales Density (£m)	Total Turnover (£m)	Turnover from Catchment Area (%)	Turnover from Catchment Area (£m)	Total Net Comparison Sales Area (sq m)	Benchmark Sales Density (£m)	Total Turnover (£m)	Turnover from Catchment Area (%)	Turnover from Catchment Area (£m)
	[1]	[2]	[3]	[4]							
Waterlooville Town Centre	602	602	4,000	2.4	85%	2.0	-	-	-	85.00%	-
Iceland, Waterlooville Town Centre	465	432	5,949	2.6	85%	2.2	33	2,761	0.1	85.00%	0.1
Asda, Waterlooville	3,285	1,905	15,891	30.3	65%	19.7	1,380	8,841	12.2	65.00%	7.9
Waitrose, Waterlooville	2,289	2,014	12,130	24.4	65%	15.9	275	8,980	2.5	65.00%	1.6
Waterlooville Town Centre	**6,641**	**4,954**		**59.7**			**1,687**		**14.8**		**9.6**
Co-op, London Road	119	99	6,258	0.6	95%	0.6	20	2,246	0.0	95.00%	0.0
Co-op, Stakes Road	121	100	6,258	0.6	95%	0.6	21	2,246	0.0	95.00%	0.0
Tesco Express, Lavender Road	226	149	13,010	1.9	95%	1.8	77	9,318	0.7	95.00%	0.7
Waterlooville Sub-total	**7,107**	**5,302**		**62.88**			**1,805**		**0.8**		**0.8**
Co-op, 83 London Road	278	231	6,258	1.4	60%	0.9	47	2,246	0.1	60.00%	0.1
Lidl, London Road	892	714	2,679	1.9	55%	1.1	178	1,800	0.3	55.00%	0.2
Other Local Stores - Cowplain	700	700	3,000	2.1	60%	1.3				60.00%	0.0
Cowplain District Centre	**1,870**	**1,644**		**5.5**			**226**		**0.4**		**0.2**
Co-op, Milton Road	155	129	6,258	0.8	60%	0.5	26	2,246	0.1	60.00%	0.0
Cowplain Sub-total	**2,025**	**1,773**	**6,258**	**6.3**			**252**		**0.1**		**0.0**
Other, Havant Borough West		2,072	4,000	8.3	50%	4.1	-	-	-	50.00%	0.0
Total				**77.4**		**50.6**					

Notes
[1] Derived from HBRS (2009), Table 1A.
[2] Derived from HBVRS (2009), Table 1A
[3] Derived from HBRS (2009), Table 1A
[4] = [2] x [3]

2008 Prices

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Table 5B: Turnover of Existing Comparison Facilities in Havant Borough West

Store	Total Net Comparison Sales Area (sq m)	Benchmark Sales Density (£m)	Total Turnover (£m)	Turnover from Catchment Area (%)	(£m)
Waterlooville Town Centre	10,542	4,064	42.8	85%	36.42
Wellington Retail Park	10,570	5,259	55.6	60%	33.35
Other Standalone Stores	2,474	5,259	13.0	60%	7.81
Cowplain District Centre	1,194	2,907	3.5	80%	2.78
Total			**114.9**		**80.4**

Notes
[1] Dervied from HBRS (2009), Table 9C.

2008 Prices

FIGURES UPDATED DUE TO CHANGE IN TABLE 5A

Table 6: Convenience Goods Capacity (£m)

	2010 (£m)	2012 (£m)	2017 (£m)
Available Convenience Goods Expenditure in CA	71.59	73.06	78.75
Deduct			
Convenience Goods Turnover of Stores within the CA	50.63	50.83	51.34
Residual Convenience Goods Capacity in CA (£m)	**20.96**	**22.23**	**27.41**

Notes
Future turnovers based on benchmark turnovers, with an increasing sales efficiency of 0.2% per annum

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Table 7: Comparison Goods Capacity (£m)

	2010 (£m)	2012 (£m)	2017 (£m)
Available Comparison Goods Expenditure in CA	116.73	119.48	140.29
Deduct			
Comparison Goods Turnover of Stores within the CA	80.35	83.44	91.67
Residual Comparison Goods Capacity in CA (£m)	**36.38**	**36.04**	**48.62**

Notes
Future turnovers based on benchmark turnovers, with an increasing sales efficiency of 1.9% per annum

IMPACTS ON TOWN CENTRE STORES COMBINED, AS PER NLP ASSESSMENT

Table 8: Assessed Patterns of Trade Draw to the Proposed Sainsbury's Foodstore

	Total Turnover 2010 (£m)	Total Turnover 2012 (£m)	Trade Draw %	Trade Draw £m	Residual Turnover 2010 £m	Residual Turnover 2012 £m	Impact Change 2010-2012 £m	Impact Change 2010-2012 %	Impact Change 2010-2017 %
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]
Waterlooville Town Centre									
Convenience	5.0	5.1	2.0%	0.5	4.4	4.5	-0.5	-10.9%	-2.0%
Comparison	42.8	43.9	10.0%	1.1	41.8	42.8	-1.1	-2.5%	14.7%
Asda, Waterlooville									
Convenience	30.3	30.9	16.0%	4.3	25.9	26.5	-4.3	-14.3%	-6.1%
Comparison	12.2	12.5	15.0%	1.6	10.6	10.9	-1.6	-13.0%	4.4%
Waitrose, Waterlooville									
Convenience	24.4	24.9	11.0%	3.0	21.5	21.9	-3.0	-12.2%	-3.6%
Comparison	2.5	2.5	2.0%	0.2	2.3	2.3	-0.2	-8.6%	9.0%
WATERLOOVILLE COMBINED									
Convenience	**59.7**	**60.9**		**7.9**	**51.8**	**52.9**	**-7.9**	**-13.2%**	
Comparison	**57.5**	**58.9**		**2.9**	**54.7**	**55.9**	**-2.9**	**-5.0%**	
Edge-of-Centre Retail Parks									
Comparison	68.6	70.2	15.0%	1.6	67.0	68.6	-1.6	-2.3%	14.8%
Out-of-Centre Other									
Convenience	3.2	3.3	1.0%	0.3	2.9	3.0	-0.3	-8.5%	0.6%
Cowplain District Centre									
Convenience	6.3	6.4	1.0%	0.3	6.0	6.1	-0.3	-4.3%	5.0%
Comparison	3.5	3.6	0.0%	0.0	3.5	3.6	0.0	0.0%	16.8%
Other, Havant Borough West									
Convenience	8.3	8.5	1.0%	0.3	8.0	8.2	-0.3	-3.3%	6.0%
Comparison	0.0	0.0	0.0%	0.0	0.0	0.0	0.0	0.0%	0.0%
Havant									
Convenience	22.9	23.4	1.0%	0.3	22.6	23.1	-0.3	-1.2%	8.0%
Comparison	153.2	156.8	4.0%	0.4	152.8	156.4	-0.4	-0.3%	16.6%
Tesco, Solent Road									
Convenience	51.0	52.0	10.0%	2.7	48.3	48.3	-2.7	-5.3%	4.0%
Comparison	20.3	20.8	12.0%	1.3	19.0	19.5	-1.3	-6.2%	11.3%
Asda, Bedhampton									
Convenience	64.5	65.8	15.0%	4.1	60.4	61.7	-4.1	-6.3%	3.0%
Comparison	46.4	47.5	15.0%	1.6	44.8	45.9	-1.6	-3.4%	13.9%
Morrisons, Horndean									
Convenience	31.4	32.1	15.0%	4.1	27.4	27.9	-4.1	-12.9%	-4.4%
Comparison	4.6	4.7	1.0%	0.1	4.5	4.6	-0.1	-2.3%	14.8%
Sainsbury's Farlington									
Convenience	31.4	32.1	10.0%	2.7	28.7	29.3	-2.7	-8.6%	0.5%
Comparison	8.3	8.5	10.0%	1.1	7.2	7.4	-1.1	-12.7%	4.6%
Emsworth									
Convenience	4.4	4.5	0.5%	0.1	4.2	4.3	-0.1	-3.1%	6.2%
Comparison	8.0	8.2	0.0%	0.0	8.0	8.2	0.0	0.0%	16.8%
Leigh Park									
Convenience	10.1	10.3	1.0%	0.3	9.8	10.0	-0.3	-2.7%	6.6%
Comparison	11.7	12.0	1.0%	0.1	11.6	11.9	-0.1	-0.9%	16.0%
Mengham / Gable Head									
Convenience	8.4	8.6	0.5%	0.1	8.3	8.5	-0.1	-1.6%	7.6%
Comparison	10.6	10.8	0.0%	0.0	10.6	10.8	0.0	0.0%	16.8%
Convenience Sub-total	**301.5**	**307.7**	**85.0%**	**23.0**	**278.5**				
Comparison Sub-total	**392.7**	**402.0**	**85.0%**	**9.0**	**383.7**				
Outside (ie Portsmouth, East Hamp)									
Convenience			15.0%	4.1					
Comparison			15.0%	1.6					

Notes
[1] Total Turnover of Existing Facilities derived from Tables 1A, 5B and 4C of the HBRS (2009). Comparison turnovers based on benchmark sales densities where not incldued in the HBRS.
[2] Increase in turnover based on the assumption that all operators gain pro-rata from the growth in convenience goods expenditure between 2010-2013 (2.5%) from Table 4A, and a growth in comparison goods expenditure between 2010-2013 (5.5%) from Table 4B. Allowance made for Lidl, Leigh Park in line with HBRS (Table 10B).
[3] % pattern of trade draw to proposed foodstore estimated on the strength, nature and geographical location of competing facilities, as well as shopping patterns highlighted in the HBRS.
[4] = [3] / £49.6m
[5] 2013 Change in turnover existing facilities following development of proposed foodstore
[6] / [7] Change in turnover of existing facilities during the period 2009 - 2013
[8] / [9] Change in 2012 turnover of existing facilities

2008 Prices