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East Hampshire Retail and Main Town Centre Uses Study Update Final Report

East Hampshire District Council

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1.0 Introduction

Purpose of the report

- 1.1 Lichfields was commissioned by East Hampshire District Council to prepare the East Hampshire Retail and Main Town Centre Uses Study (RMTCUS 2018). The key objective of the RMTCUS 2018 was to provide a robust and credible evidence base to inform future development plan policies. The study provided a quantitative and qualitative assessment of the need for new retail and main town centre uses within East Hampshire excluding the South Downs National Park area, together with a wider strategy for the future of the District's centres to 2036.
- 1.2 This 2023 report provides a partial update of the RMTCUS 2018 and rolls forward need/capacity projections to 2040. It should be read alongside the RMTCUS 2018. This report replaces the following sections of the RMTCUS 2018:
- Section 4.0: Need for retail uses (paragraphs 4.1 to 4.30, 4.36 to 4.37 and 4.40 to 4.53);
 - Section 5.0: Need for food/beverage uses (paragraphs 5.8 to 5.17);
 - Section 6.0: Need for other main town centre uses (6.6 to 6.37);
 - Section 8.0: Accommodating growth (paragraphs 8.3 to 8.23);
 - Section 9.0: Policy Options (paragraphs 9.1 to 9.5, 9.18 to 9.28 and 9.30 to 9.41)
 - Section 10.0: Conclusions and recommendations (paragraphs 10.1 to 10.17);
 - Appendix 2 - Convenience goods capacity;
 - Appendix 3 - Comparison goods capacity; and
 - Appendix 4 - Food/beverage capacity.
- 1.3 Previously main town centre uses, as defined by the NPPF, fell into to a range of different use classes e.g. A1 retail, A3/A4/A5 food/beverage, some D2 leisure uses and B1 offices. Evidence based studies have historically provided floorspace projections within these use class categories.
- 1.4 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 1.5 The UCO changes combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g., medical services and some light industrial uses.
- 1.6 This update only provides floorspace projections for selected activities now within Class E, but it does not quantify the need for office floorspace. The creation of Class E has blurred the lines. Evidence base studies and policy need to reflect this change, but it would be inappropriate to provide a global floorspace projections for all Class E uses combined, for

example, the need for office floorspace should be determined separately within the employment land review evidence, which is not linked with retail or leisure needs. An assessment of the need for sub-categories within Class E will be required, in the same way the need for comparison and convenience goods retail has historically been quantified separately despite being in the same A1 use class. Future policy should refer to activities within Class E.

- 1.7 The floorspace capacity projections in this report relate to convenience and comparison goods retail (previously A1) and restaurant/café use now in Class E and Sui Generis uses i.e., pubs/bar (previously A4) and takeaways (A5). Need projections with future development plans can continue to refer to separate floorspace projections for convenience and comparison goods retail and food/beverage uses.

Report structure

- 1.8 Section 2 of this report provides an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.
- 1.9 Section 3 updates the need assessment for other main town centre uses.
- 1.10 Section 4 re-examines the options for accommodating the identified floorspace capacity.
- 1.11 Section 5 reviews potential policy options for the emerging Local Plan Review taking account of updated floorspace capacity projections and changes to the Use Classes Order (UCO) and permitted development rights (PDR) since 2018.

2.0 Updated floorspace capacity assessment

Introduction

2.1 This section updates the quantitative assessment of the scope for new retail and food/beverage floorspace in the District at five year intervals up to 2040. The updated projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential longer-term implications of the Covid-19 pandemic and the cost of living crisis.

Implications of Brexit, Covid-19 and other trends

2.2 As indicated in the RMTCUS 2018, historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the 2009 financial crisis expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

2.3 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2022, 2023 and 2024) for retail and leisure were published in February 2023 and now reflect Brexit, the Covid-19 pandemic and the cost of living crisis. The main implications of these recent events for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of cost of living crisis and the post Covid recovery period. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.5 In the short term, high street operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were hardest hit during the Covid-19 crisis. Short-term supply chain disruption led to inflationary pressure, which had an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short term. There is likely to be a longer terms structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.6 Bearing these trends in mind, following the Covid-19 crisis there has been a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures.

- 2.7 The Covid-19 crisis and Brexit has had some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the plan period with interval projections (i.e., 2023 base year to 2025, 2030, 2035 and 2040), development plan policy should assume population projections will return to projected levels by 2025. The first interval population projections in 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis and Brexit.
- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 Experian's Retail Planner Briefing Note 20 (February 2023) suggests non-store retailing's market share increased from 20.1% in 2019 to 30.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 24.5% to 38.3% and convenience good sales increased from 12.8% to 19.3%. However, Experian indicates comparison goods non-store sales figure fell slightly during 2022 down to 36%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019.
- 2.13 The RMTCUS 2018 household survey results indicated that 7.4% of respondents did most of their food and grocery shopping via the internet and 15.1% did most of their non-food shopping via the internet, with particularly high home shopping for books/gifts (41.4%), domestic electrical goods (36.8%), other electrical goods (34.4%) and clothing/footwear (23.1%). These results were consistent with national average non-store sales at that time

and it is reasonable to assume non-stores sales will have increase since 2018 in line with national trends.

2.14 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased fee delivery thresholds may benefit traditional retailing.

2.15 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. It is not appropriate assume a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

Long-term expenditure trends

2.16 The current cost of living crisis, including high level of inflation has resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Low growth is predicted during 2023 and 2024 but higher growth is expected in the longer term.

2.17 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.

2.18 For convenience goods, Experian's latest forecasts (February 2023) suggest a period of readjustment with the high growth in expenditure experienced during the Covid 19 lockdowns reversed during 2021 to 2024. In the longer term limited growth is forecast between 2025 to 2029 (0.1% per annum), increasing to 0.2% per annum thereafter. Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in East Hampshire is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

2.19 Comparison goods expenditure per head is predicted to decline by 2% during 2022 and 2023. A return to modest growth is expected in the longer term (between 2.5% to 3% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

2.20 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 20 (February 2023) states:

"The pace of e-commerce growth is anticipated to moderate over the longer term, but the market share hits 38.2% of total retail sales by 2040."

2.21 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Demand for town centre floorspace

2.22 In the past lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.4% in 2022. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

2.23 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost of living crisis and will continue in the short-term.

2.24 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Key data and methodology

Price base

2.25 All monetary values expressed in this study are at 2021 prices, consistent with Experian's base year expenditure figures for 2021, which are based on actual recorded expenditure levels rather than projections. The RMTCUS 2018 adopted a 2016 price based. Expenditure and turnover figures within the two reports will not be directly comparable.

Study area and end year

- 2.26 As in the RMTCUS 2018, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the District. The study area is sub-divided into five zones as shown in Appendix 1.
- 2.27 The RMTCUS 2018 provided projections up to 2021, 2026, 2031 and 2036. The projections in this update report have been rolled forward with new projections for 2025, 2030, 2035 and 2040, therefore the floorspace capacity estimates are not directly comparable.

Population projections

- 2.28 Experian's latest population projections have been adopted as shown in Table 1 (Appendix 1). These projections are aligned with the Office of National Statistics 2018 based sub-national population projections. The RMTCUS 2018 adopted Experian's 2016 base year population projections, which suggested the study area population would increase by +9.8% between 2018 and 2036. Experian's latest projections now suggest +6.6% growth between 2023 to 2040.
- 2.29 Experian's data suggests population within the study area is projected to increase from 164,897 in 2023 to 175,840 in 2040, as shown in Table 1 in Appendix 2.

Expenditure forecasts

- 2.30 Experian's latest local expenditure figures for the East Hampshire study area in 2021 have been obtained for each zone. Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 20 – February 2023) has been used to forecast expenditure within the study area. Experian's short term EBS growth forecast rates during 2022, 2023 and 2024 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:
- convenience goods: -9.3%;
 - comparison goods: -1.7%;
 - leisure: +21.1%.
- 2.31 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2022, 2023 and 2024. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is forecast to decline during 2022 and 2023.
- 2.32 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:
- convenience goods: +0.1% per annum growth for 2025 to 2029 and 0.2% per annum beyond 2029;
 - comparison goods: +2.5% per annum growth for 2025 to 2029 and +3% per annum beyond 2029; and
 - leisure: +1% per annum growth for 2025 to 2029 and +0.9% per annum after 2029.

- 2.33 These growth figures relate to real growth and exclude inflation. High inflation at present is likely to affect the volume of retail sales at least in the short-term, with some households cutting back particularly on non-essential and luxury items. This impact on the volume of retail sales is reflected in Experian's short-term expenditure forecasts which suggest a real term decline in expenditure per person during 2022 and 2023.
- 2.34 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2023 are:
- 5.8% of convenience goods expenditure; and
 - 28.7% of comparison goods expenditure.
- 2.35 Experian's projections suggest that these percentages will increase to 7% and 30.3% by 2030, respectively. The long-term Experian projections suggest an increase to 7.8% and 32.3% by 2040, respectively.
- 2.36 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2040, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.
- 2.37 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the East Hampshire study area is forecast to increase by +6.5% from £443 million in 2023 to £472 million in 2040, as shown in Table 3 (Appendix 2).
- 2.38 Comparison goods spending is forecast to increase by +54.2% between 2023 and 2040, increasing from £565 million in 2023 to £872 million in 2040, as shown in Table 3 (Appendix 3).
- 2.39 Food and beverage spending is forecast to increase by +23.3% between 2023 and 2040, increasing from £313 million in 2023 to £386 million in 2040, as shown in Table 3 (Appendix 4).

Growth in turnover densities

- 2.40 Experian's Retail Planner Briefing Note 20 – February 2023 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -0.4% during 2024, but will grow in the medium term (+2% per annum during 2025 to 2029), and longer term (+2.8% per annum beyond 2029). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 2.41 For convenience goods retail, Experian indicates a 2.8% increase in sales densities during 2024; a small average increase of 0.1% per annum during 2025 to 2029; and no predicted growth in sales densities thereafter.
- 2.42 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.7% decline in sales densities during 2024; a small average increase of 0.4% per annum during 2025 to 2029; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

- 2.43 Expenditure patterns in the 2023 base year adopt market shares within each study area zones taken from the RMTCUS 2018. These market shares were calculated from the results of a household shopper survey in 2018. These market shares are assumed to have remained constant up to 2023, because there have been no significant changes in retail and food/beverage provision since the RMTCUS 2018, although the amount of SFT expenditure deducted has increased based on Experian's latest data.
- 2.44 The impact of planned retail and food/beverage commitments in Alton and at Whitehill & Bordon have been assessed at future years.

Capacity for convenience goods retail floorspace

- 2.45 Available convenience goods expenditure attracted to East Hampshire District has been projected from the 2023 base year forward to 2025, 2030, 2035 and 2040, and is summarised in Table 13 in Appendix 2. Projected shopping patterns without planned commitments in 2025 are shown Table 6 in Appendix 2, based on constant market shares from 2023.
- 2.46 The expected convenience goods turnover of planned commitments is shown Table 7 in Appendix 2. The trade draw is based on existing shopping patterns for Alton and Whitehill & Bordon indicated by the 2018 household survey results. Shopping patterns in 2025 have been adjusted to reflect the implementation of the retail commitments in Table 8 in Appendix 2, based on the expected trade draw distribution.
- 2.47 Convenience goods expenditure available to facilities within the District is expected to increase from £223.37 million in 2023 to £249.62 million in 2040. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). The increase also includes trade diversion to planned commitments from outside the District.
- 2.48 The benchmark turnover of the main existing food stores and floorspace has been updated as shown in Table 12 in Appendix 2. This table adopts the latest ORC food store sales floorspace data and GlobalData's latest company average sales densities. The combined benchmark turnover of existing convenience foods floorspace in the District is £196.94 million. This benchmark turnover excludes small convenience goods shops outside of the main centres in the District.
- 2.49 The base year available expenditure figures when compared with the benchmark turnover of convenience goods retail sales floorspace in the District is collectively trading satisfactorily. A breakdown for each main centre is set out in Table 2.1 overleaf.
- 2.50 Table 13 in Appendix 2 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future. Where there is a deficit in available expenditure i.e. where the supply of floorspace exceeds available expenditure, the expenditure and floorspace figures are shown in **red** in the tables in this section.
- 2.51 Overall, there is an estimated convenience goods expenditure surplus in 2023, due to high levels of trading in Bordon and Liphook, where there is a theoretical under-supply of floorspace. This expenditure surplus suggests an under-supply of floorspace, which offsets an over-supply of floorspace in Alton and Clanfield.

Table 2.1 Convenience goods turnover in 2023 (£ millions)

	2023 turnover	Benchmark turnover	Surplus/Deficit
Alton	78.18	89.74	-11.56
Whitehill & Bordon	45.40	27.99	17.41
Liphook	47.10	32.50	14.60
Clanfield	4.16	5.38	-1.21
Four Marks	6.12	5.39	0.72
Grayshott	7.25	7.23	0.02
Horndean	30.12	28.70	1.42
Other	5.03	5.03	n/a
Total	223.37	201.96	21.40

Source: Tables 12 and 13, Appendix 2.

- 2.52 The completion of food stores commitment in Alton (Lidl and Home Bargains), Bordon (Morrison's) and Horndean is expected to create a small expenditure deficit of -£10.94 million in 2025, which will reduce to -£5.97 million in 2030. Longer term population growth suggests a surplus of +£4.96 million in 2040.
- 2.53 The surplus/deficit expenditure projections have been converted into floorspace estimates Table 14 in Appendix 2, based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The results are summarised in Table 2.2 below.
- 2.54 Surplus expenditure up to 2040 indicates that there is combined capacity for additional convenience goods floorspace in the District of 587 sq.m gross.

Table 2.2 Convenience goods floorspace capacity (sq.m gross) - cumulative

	2025	2030	2035	2040
Alton	-2,482	-2,323	-2,094	-1,868
Whitehill & Bordon	572	687	838	1,012
Liphook	992	1,059	1,153	1,264
Clanfield	-179	-171	-160	-148
Four Marks	34	44	60	74
Grayshott	-36	-24	-7	12
Horndean	-167	45	137	235
Other	-36	-25	-11	5
Total	-1,303	-708	-83	587

Source: Table 14 in Appendix 2.

Capacity for comparison goods floorspace

- 2.55 Available comparison goods expenditure has been projected to 2025, 2030, 2035 and 2040 as summarised in Table 12 in Appendix 3. Projected shopping patterns without planned commitments in 2025 are shown Table 6 in Appendix 3, based on constant market shares from 2023.
- 2.56 The expected comparison goods turnover of planned commitments is shown Table 7 in Appendix 3. The trade draw is based on existing shopping patterns for Alton and Whitehill & Bordon indicated by the 2018 household survey results. Shopping patterns in 2025 have

been adjusted to reflect the implementation of the retail commitments in Table 8 in Appendix 3, based on the expected trade draw distribution.

- 2.57 Comparison goods expenditure available to facilities within the District is expected to increase from £77.47 million in 2023 to £137.71 million in 2040. Table 12 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus expenditure available for new development.
- 2.58 The projections suggest future growth in available expenditure will be offset by planned commitments and the expected growth in turnover densities up to and beyond 2035 i.e., existing retail businesses and commitments will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 2.59 In 2030 there is a projected small expenditure deficit of -£2.36 million, reducing to - £1.17 million in 2035. The projected longer-term surplus in 2040 is only +£0.16 million. Deficit and surplus comparison expenditure has been converted into comparison goods floorspace projections in Table 13 in Appendix 3, as summarised in Table 2.3.
- 2.60 Surplus expenditure in 2040 indicates that there is combined capacity for only 25 sq.m gross of additional comparison goods floorspace in the District. Separate capacity figures are not provided for the smallest centres due to the reliability of household survey sample sizes for these destinations.

Table 2.3 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2025	2030	2035	2040
Alton	-421	-314	-225	-79
Whitehill & Bordon	-155	-90	-39	53
Liphook	-69	-42	-27	16
Grayscott	-26	-18	-13	0
Other*	-32	-10	5	34
Total	-703	-475	-299	25

Source: Table 13 in Appendix 3. * figures for Clanfield, Four Marks and Horndean included in 'Other' category.

- 2.61 A comparison goods expenditure deficit is projected up to and beyond 2035, which suggests an over-supply of retail floorspace (post commitments), resulting in negative floorspace projections. However, the small surplus expenditure in 2040 indicates a balance between supply and demand.

Capacity for food/beverage floorspace

- 2.62 Available food and beverage expenditure has also been projected forward to 2025, 2030, 2035 and 2040, and is summarised in Table 12 in Appendix 4. Projected expenditure patterns without planned commitments in 2025 are shown Table 6 in Appendix 4, based on constant market shares from 2023.
- 2.63 The expected food/beverage turnover of planned commitments is shown Table 7 in Appendix 4. The trade draw is based on existing shopping patterns for Horndean and Whitehill & Bordon indicated by the 2018 household survey results. Expenditure patterns

in 2025 have been adjusted to reflect the implementation of the food/beverage commitments in Table 8 in Appendix 4, based on the expected trade draw distribution. The amount of expenditure attracted to the District is expected to increase from £84.16 million in 2023 to £119.98 million in 2040.

2.64 Table 12 in Appendix 4 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. There is an expenditure deficit of -£4.3 million in 2025, primarily due to the implementation of commitments. Continued population and expenditure growth creates a surplus of +£2.48 million at 2030 increasing to +£7.99 million at 2035 and +£13.63 million by 2040. Surplus expenditure has been converted into food/beverage floorspace projections in Table 13 in Appendix 4, as summarised in Table 2.4 below.

Table 2.4 Food and beverage floorspace capacity (sq.m gross) - cumulative

	2025	2030	2035	2040
Alton	-161	169	520	865
Whitehill & Bordon	-138	244	362	476
Liphook	-92	5	104	209
Clanfield	-72	-25	23	72
Grayshott	-78	-14	52	122
Horndean	-132	10	157	307
Other*	-44	23	95	166
Total	-717	412	1,313	2,219

Source: Table 13 in Appendix 4. * figures for Four Marks included in 'Other' category.

2.65 Surplus expenditure up to 2040 indicates that there is capacity for additional food/beverage floorspace in the District of 2,219 sq.m gross, over and above current commitments.

3.0 Other town centre uses

3.1 This section updates the assessed need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. The demand for office uses (now included in the new Use Class E) will need to be assessed in the context of the wider need for Class B employment uses, as part of a separate employment land review.

Leisure, entertainment and cultural expenditure

3.2 Experian's projections and local expenditure data for the East Hampshire study area indicates the resident population generates £85.7 million in 2023 (an average of about £520 person) on selected cultural, recreational and sporting services, including:

- cinema admissions;
- live entertainment i.e. theatre/concerts/shows;
- museums, theme parks, houses and gardens;
- admissions to clubs, dances, discos, bingo;
- other miscellaneous entertainment;
- subscriptions to sports and social clubs; and
- leisure class fees.

3.3 Expenditure can be projected to 2040 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 20 – February 2023). Taking population growth into account leisure expenditure is projected to increase by 16.9% from £85.7 million in 2023 to £105.7 million in 2040.

3.4 Not all leisure/cultural spend from study area residents will be spent in East Hampshire. The household survey results have been used to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 5.1. Less than 12% of households did not participate in any of the 12 leisure activities explored by the 2018 household survey.

3.5 The participation and retention rates varied significantly for each activity. Many residents travelled outside East Hampshire e.g. to Basingstoke, Chichester, Guildford, Portsmouth and Southampton for leisure activities.

3.6 Residents in East Hampshire District have limited access to the full range of commercial leisure and entertainment facilities within the District, therefore the retention rates for all activities are relatively low. Residents need to travel outside of the District visit most commercial leisure uses.

Table 3.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% households participating	% trips attracted to East Hampshire
Cinema	59.9	6.9
Theatre	44.3	1.7
Nightclubs / live music venues	5.4	2.1
Bingo	2.4	6.4
Gyms / health and fitness club	26.0	34.4
Tenpin bowling	14.4	0.0
Museum	40.1	5.0
Art galleries	25.5	1.3
Ice rink	9.8	0.0
Trampoline parks	10.5	3.5

Source: NEMS household survey results 2018

3.7 The retention rate for theatre (1.7%), museum (5%) and art gallery (1.3%) trips are particularly low. The revised new town centre proposals at Bordon include the provision of a new dedicated theatre, an art gallery and a local history museum within the Mess Hall building, with a total floor area of 1,676 sq.m. If implemented, these entertainment facilities should increase East Hampshire's market share of theatre, museum and art gallery trips.

3.8 The household survey results and Experian's expenditure figures have been used to estimate East Hampshire's combined leisure, entertainment and cultural expenditure market share within the study area. Taking the existing leisure trip retention rates into account and the split of cultural/entertainment expenditure between activities, it is unlikely East Hampshire currently attracts more than 20% of resident's total leisure expenditure within the study area, less than £17.1 million of the £85.7 million total.

Leisure, entertainment and cultural floorspace capacity

3.9 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +5.8% between 2023 to 2030 and by +15.7% between 2023 to 2040. With population growth leisure/cultural expenditure should increase from £85.7 million in 2023 to £93.6 million by 2030, an additional £7.9 million. The longer term increase to 2040 is an additional £20 million.

3.10 As a minimum, it is reasonable to assume East Hampshire can continue to retain about 20% of this expenditure growth. If the District can achieve this market share of leisure expenditure across the study area then the amount of retained expenditure will increase from £17.1 million in 2023 to £18.7 million in 2030, and then to £21.1 million in 2040.

3.11 Experian projections (Retail Planner Briefing Note 20 – Leisure) suggest the sales density of leisure floorspace will decrease by -0.7% during 2024 but will recover to +0.4% per annum between 2025 to 2029 and then by +0.2% per annum thereafter. Based on these growth rates the leisure turnover of existing facilities should increase from £17.1 million in 2023 to £17.4 million by 2030 and then to £17.7 million in 2040.

3.12 In 2030 projected expenditure growth available to new development could be £1.3 million, increasing to £3.4 million in 2040. Based on Lichfields' experience, leisure floorspace normally trades, on average, around £2,500 per sq.m gross. The projected surplus leisure expenditure could support about 500 sq.m gross in 2030, increasing to 1,400 sq.m gross by

2040. These floorspace projections could, for example, support a medium sized health and fitness gym by 2030 or a new leisure innovation. By 2024 three medium sized health and fitness gyms could be supported.

- 3.13 These floorspace projections are relatively modest and do not assume new facilities will increase the District's market share of leisure/entertainment trips. Proposed entertainment facilities at Bordon should help to increase the District's market share. If East Hampshire can attract 25% (rather than 20%) of projected leisure/entertainment expenditure then the increase in expenditure potentially available to new development could be about £6 million in 2030, increasing to £8.7 million in 2040, which could support about 2,400 sq.m gross by 2030 or 3,500 sq.m gross by 2040. The implementation of proposed new entertainment facilities at Bordon could reduce these floorspace projections to 700 sq.m gross in 2030 or 1,800 sq.m gross in 2040.
- 3.14 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 3.15 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million).
- 3.16 The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2022 figures indicate just over 117 million cinema trips were made in the UK, still 33% below pre-Covid levels (176 million). The cinema assessment for East Hampshire assumes trip levels comparable with the UK average pre-Covid levels, i.e. an average of 2.6 trips per person per annum.
- 3.17 The UK Film Association identifies 846 cinema facilities with 4,637 screens and 790,000 seats in the UK in 2022. Lichfields' national CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.
- 3.18 The East Hampshire study area population is 164,897, which based on the national averages above, would generate 429,000 cinema trips, which could theoretically support 11.3 cinema screens or 2,258 cinema seats. However, not all cinema trips will be retained within East Hampshire, therefore the theoretical capacity will be much lower than 11.3 screens.
- 3.19 The Palace Cinema in Alton (2 screens and 171 seats) closed in 2022. The Living Room Cinema in Liphook recently opened a small cinema with an auditorium for 61 people.

Nightflix opened a drive-in cinema in July 2021 at the Parade Square in Bordon, but Nightflix went into liquidation. A new outdoor cinema and community events space at The Shed opened in April 2023 in Bordon.

3.20 Based on the previous low cinema market share for East Hampshire (about 7%) suggested by the household survey results, only one screen with 158 cinema seats could be supported in the District based on the UK pre-Covid average visitation rate (2.6 trips per person).

3.21 Cinema provision surrounding East Hampshire offers significant choice. The main facilities (totalling 81 screens) are:

- Odeon, Guildford (9 screens);
- Cineworld, Chichester (10 screens);
- Harbour Lights Picturehouse, Southampton (2 screens);
- Showcase Cinema de Lux, Southampton (10 screens);
- Vue, Gunwharf Quays, Portsmouth (14 screens)
- No. 6 Cinema, Portsmouth (1 screen);
- Odeon, Port Solent (6 screens)
- Everyman, Winchester (2 screens);
- Cineworld, Aldershot (7 screens);
- Vue, Basingstoke (10 screens); and
- Odeon, Basingstoke (10 screens).

3.22 Population within the East Hampshire study area is projected to increase from 164,897 to 175,840 by 2040, generating 457,200 cinema trips in 2040. If East Hampshire could attract 30% of these cinema trips (137,000 trips) then the theoretical capacity would be 3 to 4 screens with about 700 seats.

3.23 The new town centre at Bordon previously included a six screen multiplex cinema proposal as part of the original Phase 1 development. Modifications to the planning application have changed the composition of the new town centre. It is not clear whether this cinema proposal will be viable or pursued in the future, particularly with the new outdoor cinema at The Shed.

3.24 Population levels and the low previous cinema market share (7%) suggest there is limited capacity to support cinema facilities in East Hampshire over and above the outdoor facility in Bordon and the Living Room cinema in Liphook. Existing cinema provision in surrounding settlements may also limit operator demand for a new facility in the District. Furthermore, the longer-term impact of Covid-19 on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the UK average of 2.6 trips per person.

Theatres, nightclubs, live music and other cultural activities

- 3.25 The 2018 household survey results indicated a relatively high proportion (over 44%) of respondents in the study area visited theatres. About 40% visited museums; over 25% visited art galleries, but less only 5% visit nightclubs/live music venues.
- 3.26 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.
- 3.27 Experian's local expenditure data indicates the East Hampshire study area generated £10.5 million on live theatre, concerts and shows in 2021, which is projected to increase to £12.9 million in 2023 and £15.9 million in 2040. Based on the average ticket revenue per venue (£5.7 million) the East Hampshire study area population currently generates theoretical demand for two venues. This theoretical demand could increase to about three venues in 2040.
- 3.28 The 2018 household survey results suggested less than 2% of theatre trips were retained in the District, which reflects the limited provision of theatres, with only small theatres e.g. the Holybourne Theatre in Alton and the Phoenix Theatre & Arts Centre in Bordon.
- 3.29 A new theatre space is now proposed within the Mess Hall building at Bordon. As highlighted in the RMTCUS 2018, the catchment areas of the towns in East Hampshire are unlikely to support a full-time theatre facility and there is no clear identified need, over and above the facility proposed at Bordon.
- 3.30 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 3.31 The 2018 household survey results suggested only 5% of households visit nightclubs/music venues and of these participating households only 2% of trips generated by the study area were retained within East Hampshire.
- 3.32 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc was only £1.8 million within the East Hampshire study area, which should have recovered to £2.2 million in 2023. This expenditure is projected to increase to about £2.7 million in 2040. This small increase in retained expenditure (+£0.5 million) and access to nightclub/live music venues in London, Guildford, Portsmouth and Southampton are likely to limit demand for additional facilities in East Hampshire.
- 3.33 Experian's local expenditure data indicates the East Hampshire study area generated £9.4 million on museums, theme parks, houses and garden in 2021 which should have recovered to about £11.5 million in 2023. This expenditure is projected to increase to about £14.2 million in 2040. This growth would generate an additional £2.7 million by 2040.

- 3.34 The 2018 household survey results suggest East Hampshire retained a low proportion of trips to Museums (5%) and Art galleries (1%). Most participating households are attracted to facilities in London. East Hampshire's potential share of expenditure growth between 2023 and 2040 would be less than £1.4 million, if half the projected expenditure growth was retained in the District. This retained growth could support a small new attraction. A new local museum and art gallery is proposed within the Mess Hall building at Bordon.
- 3.35 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision, over and above facilities proposed at Bordon (1,676 sq.m in total). However, there may be potential to further increase East Hampshire's market share and attract more demand from tourist visitors if provision was improved. The development strategy for the entertainment and cultural sector needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 3.36 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022 and the number of clubs reduced by 176. The participation rate dropped back to 14.6% in 2022. The 2018 household survey results indicated 26% of households visited health and fitness gyms, which is higher than the national average participation rate of less than 15%.

The Sport England/Active Places data indicates that there are 11 registered health and fitness facilities in East Hampshire (excluding Petersfield), with 509 fitness stations, as shown in Table 3.2.

Table 3.2 Health and fitness facilities in East Hampshire

Name	Type	Number of fitness stations
Alton School, Alton	Private Use	9
Alton Sports Centre, Alton	Registered Membership use	130
Anytime Fitness, Bordon	Registered Membership use	100
Blacknest Golf & Country Club, Alton	Pay and Play	15
Bohunt School, Liphook	Pay and Play	26
Eggars School, Alton	Private Use	14
Energique Health Club & Spa, Alton	Registered Membership use	45
Horndean Technical College, Horndean	Pay and Play	37
HSDC Alton	Private Use	16
Results Health Club, Alton	Registered Membership use	37
Whitehill & Bordon Leisure Centre	Registered Membership use	80
Total		509

Source: Sport England

- 3.37 The number of Sport England registered fitness stations in the District has increased from 324 in 2018 to 509 in 2023. The main changes since 2018 is the addition of Anytime Fitness in Bordon and the increase in fitness stations at available at Alton Sports Centre and Whitehill & Bordon Leisure Centre. It should be noted Sport England data does not include

all health and fitness gyms, e.g. Athlete Movement in Liphook and Iron Forge Gym in Alton, therefore the actual number of fitness stations will be higher than 509.

- 3.38 The study area population in 2023 (164,897 people) is projected to grow to 175,840 by 2040. As indicated above, the District has a market share of 34.4%, which implies a catchment population of about 57,000 in 2023, increasing to about 61,000 in 2040. The current catchment population (57,000) suggests East Hampshire District has over 8.9 fitness stations per 1,000 people (assuming more than 509 stations in total).
- 3.39 The South East region has 1,282 Sport England registered health and fitness facilities with 72,210 fitness stations (average of 56 stations per facility). This existing provision equates to 7.8 registered fitness stations per 1,000 people in the South East region, but this figure would be higher if all unregistered facilities were included. These figures suggest East Hampshire currently has a high provision of health and fitness facilities i.e. +64 stations above that suggested by the South East region average, which is consistent with the relatively high participation rate suggested by the household survey results.
- 3.40 Demand for additional facilities within East Hampshire should arise from future population growth, increased participation rates and/or increased trip retention. Population within the study area is projected to increase to 175,840 in 2040, an additional 10,943 people. Based on the existing East Hampshire average of 8.9 fitness per 1,000 people, East Hampshire's health and fitness catchment population (61,000 in 2038) could support 543 fitness stations. If the trip retention rate increased from 34.4% to 40%, then 626 fitness stations could be supported compared with existing provision of 509 fitness stations. This projected additional demand (+117 fitness stations) could support one large or two medium sized facilities.

Tenpin bowling and other indoor leisure innovations

- 3.41 Freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.
- 3.42 The 2018 household survey results indicated about 14% of households visit ten-pin bowling facilities but all participating households visited facilities outside East Hampshire. There are no tenpin bowling/family entertainment facilities in East Hampshire.
- 3.43 The East Hampshire study area's future 2040 population (175,840) could theoretically support 14 lanes, based on the national average of one lane per 12,000 people.
- 3.44 As highlighted in the RMTCUS 2018, the limited catchment populations of the towns in East Hampshire and existing provision nearby will restrict the potential for a tenpin bowling facility within East Hampshire.
- 3.45 Indoor trampoline centres are still a relatively new leisure activity in the UK. Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

3.46 The 2018 household survey results indicated less than 11% of respondents in the study area visited trampoline centres, with most participating households visiting facilities in larger towns i.e. Guildford, Portsmouth, Basingstoke and Chichester.

3.47 As highlighted in the RMTCUS 2018, the limited catchment populations of the towns in East Hampshire and existing provision nearby will restrict the potential for a trampoline facility within East Hampshire. However, there may be potential to accommodate new leisure innovations.

Bingo, games of chance and gambling

3.48 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

3.49 The Gambling Commission indicates there were 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

3.50 The 2018 household survey results indicated only 2.4% of respondents in the study area visit bingo facilities, lower than the UK average participation rates of around 5%. The adult population in the study area (about 128,000 in 2023) is theoretically capable of supporting a bingo facility, based on the UK average. However, the low participation rate (2.4%), dispersed population and existing provision nearby will restrict potential in East Hampshire.

Conclusions on commercial leisure and other town uses

3.51 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a large number of other activities that could be promoted e.g. museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of new innovations could emerge in East Hampshire. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

3.52 In global terms future expenditure growth could support new commercial leisure and cultural floorspace in East Hampshire District. In total 1,676 sq.m is proposed for theatre, museum and art gallery uses at Bordon. The capacity projections suggest there could be scope for additional floorspace over and above this commitment as follows:

- 700 sq.m by 2030; or
- 1,800 sq.m by 2040.

3.53 This additional floorspace could include:

- a large health and fitness facility (about 100 fitness stations) or two medium sized facilities;
- new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

3.54 This scale of floorspace could be accommodated within repurposed retail floorspace in centres or could form part of residential led mixed use developments.

3.55 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered. The projected scale of additional floorspace (1,800 sq.m) indicate there is no pressing need to identify specific site allocations to meet this level of potential need.

4.0 Accommodating growth

Introduction

- 4.1 The National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability.

Floorspace capacity projections

- 4.2 Tables 4.1, 4.2 and 4.3 summarise the floorspace projections for convenience, comparison goods retail and food/beverage uses by broad location up to 2030, 2035 and 2040. Floorspace over-supply (negative estimates) is shown in red. Other floorspace figures relate to an under-supply where new development may be required.

Table 4.1 Combined retail and food/beverage floorspace capacity at 2030 (sq.m gross)

	Convenience goods	Comparison goods	Food/ beverage	Total
Alton	-2,323	-314	169	-2,468
Whitehill & Bordon	687	-90	244	841
Liphook	1,059	-42	5	1,022
Grayshott	-24	-18	-14	-56
Other	-107	-10	8	-109
Total	-708	-475	412	-770

Table 4.2 Combined retail and food/beverage floorspace capacity at 2035 (sq.m gross)

	Convenience goods	Comparison goods	Food/ beverage	Total
Alton	-2,094	-225	520	-1,799
Whitehill & Bordon	838	-39	362	1,161
Liphook	1,153	-27	104	1,230
Grayshott	-7	-13	52	32
Other	27	5	276	308
Total	-83	-299	1,313	932

Table 4.3 Combined retail and food/beverage floorspace capacity at 2040 (sq.m gross)

	Convenience goods	Comparison goods	Food/ beverage	Total
Alton	-1,868	-79	865	-1,082
Whitehill & Bordon	1,012	53	476	1,541
Liphook	1,264	16	209	1,489
Grayshott	12	0	122	134
Other	166	34	546	746
Total	587	25	2,219	2,828

Source: Table 14 in Appendix 2, Table 13 in Appendix 3 and Table 13 in Appendix 4

- 4.3 The combined floorspace projections from the capacity assessment appendices suggest a broad balance between floorspace supply and demand up to 2030, but there is an emerging modest requirement for additional floorspace by 2035 of +932 sq.m gross increasing to +2,828 sq.m gross in 2040.

Vacant units

- 4.4 As indicated in the RMTCUS 2018, the existing stock of premises should help to accommodate projected growth. The retail capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace should help to accommodate residual future growth.
- 4.5 In 2017 there were 57 vacant shop units in Alton, Whitehill & Bordon (High Street), Liphook, Whitehill & Bordon (Forest Centre), Clanfield, Horndean, Four Marks and Grayshott which equated to an overall vacancy rate of 12.7%, which was slightly higher than the Goad national average of 11.8% at that time. Alton, Liphook and Whitehill & Bordon (Forest Centre) had vacancy rates higher than national average and the Forest Centre had a very high vacancy rate (27.3%).
- 4.6 The RMTCUS suggested if half the existing vacant floorspace can be reoccupied then there could be potential for re-occupied vacant space to accommodate the following new floorspace (assuming an average of 100 sq.m gross per vacant unit):
- Alton town centre - 1,500 sq.m gross
 - Whitehill & Bordon (High Street and Forest Centre) - 500 sq.m gross
 - Liphook - 400 sq.m gross
 - Other local centre - 400 sq.m gross
- 4.7 This potential reoccupied vacant shop units in total could accommodate up to 2,800 sq.m gross. If this reduction in vacant units can be achieved, then the overall retail/food and beverage floorspace projection for East Hampshire up to 2040 would be accommodated.
- 4.8 These projections and vacant floorspace estimates suggest there is no pressing need to identify major new allocations for retail and food/beverage development, particularly in Alton and across the District up to 2035.
- 4.9 The need to retain retail floorspace needs to be considered. The policy options are explored in Section 5.
- 4.10 The combined floorspace projection up to 2040 (2,828 sq.m gross) relates to convenience goods shopping and food/beverage uses rather than comparison goods shopping. New convenience goods shopping could be required to serve new residential developments in the form of local/neighbourhood centres, rather than new development in centres e.g. focused in Alton town centre. Some of the projected food/beverage floorspace could be provided in new local/neighbourhood centres. The expansion of comparison goods retail floorspace is not a short or medium term priority and a more flexible approach to accommodate

food/beverage uses and other non-retail uses should be considered, notwithstanding the changes to the UCO. The potential options are assessed in the next section.

Development opportunities

- 4.11 The RMTCUS 2018 reviewed potential development opportunities within the District's main centres. In Alton and Liphook, five potential development sites were identified, with a theoretical capacity to accommodate up to 20,000 sq.m gross of retail and food/beverage floorspace. This level of development is not required up to 2040.
- 4.12 The updated combined floorspace projection for the District (+3,275 sq.m gross to a later 2040 end year) is lower than the previous projection (down from 6,173 sq.m gross in 2036). Furthermore, the theoretical ability of vacant floorspace to accommodate growth in town centres (2,800 sq.m gross) suggests a limited residual requirement of about 500 sq.m gross in 2040.
- 4.13 The floorspace projections are over and above the revised Phase 1 town centre development at Bordon and other commitments at Alton and Horndean. Some of the residual capacity could be accommodated in later phases of development at the new town centre in Bordon.

5.0 Policy review

National policy and other changes

- 5.1 The RMTCUS 2018 reviewed adopted town centre and retail policies, including shopping frontage and boundary policies options. The RMTCUS was based on the guidance set out in the NPPF (published by the Department for Communities and Local Government on 27 March 2012). The latest NPPF (as amended July 2021) indicates planning policies should (para. 86):
- define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
 - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 5.2 In relation to town centres, the latest NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years.
- 5.3 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to respond to ‘rapid changes in the retail and leisure industries’. Accordingly, planning policies should clarify ‘the range of uses permitted in such locations, as part of a positive strategy for the future of each centre’.
- 5.4 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 5.5 The Draft Local Plan 2017 – 2036 (Regulation 18) recognised the important role played by retail and leisure services. Draft policies sought to enable and encourage a full range of town centre uses including retail, leisure, entertainment facilities, arts, culture and tourism development. The Draft Plan recognised a diversity of uses add to a town centre, making it more attractive, but concentrations of uses in the same locality can be unacceptable.

- 5.6 The appropriate balance between retail and other town centre activity has been hotly debated in recent years, as town centres increasingly need to compete with on-line shopping. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 5.7 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 5.8 This section reviews the previous policy recommendations taking account the latest NPPF and other changes.

Strategy and retail hierarchy

- 5.9 The Draft Local Plan 2017 – 2036 (Regulation 18) set out an overall strategy for the plan area. Consistent with the NPPF, the strategy sought to improve the vitality and viability of the District's town, district and local centres by protecting and improving provision of retail and other main town centre uses to meet local needs.
- 5.10 The NPPF (paragraph 86) indicates that planning policies should define a network and hierarchy of centres and promote their vitality and viability. The PPG indicates that planning policies should identify a realistic role, function and hierarchy of town centres over the plan period and establish a vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- 5.11 The Draft Local Plan's objectives remain consistent with guidance within the NPPF, PPG and the updated floorspace capacity projections in this report. The Draft Plan (Policy S16) defined a four tier network of centres and local parades, as follows:
- **Town Centres** - Alton and Whitehill & Bordon;
 - **District Centre** - Liphook (The Square);
 - **Local Centres** – Liphook (Station Area), Clanfield, Four Marks, Grayshott, Horndean and the Forest Centre at Whitehill; and
 - **Local Parades and small local centres.**
- 5.12 Alton and Whitehill & Bordon continue to be the dominant centre in the District, serving their settlements and wider rural hinterlands. Based on the scale of facilities available within each settlement and the floorspace projections in this update, the Draft Plan's network/hierarchy remains appropriate.
- 5.13 The Local Plan should also seek to identify local parades and smaller neighbourhood centres that perform an important role in serving the day to day needs of local communities and encourage 'living locally'. These retail and service clusters should be protected. For example, changes of use or development that would result in the loss of Class E and Class F.2 (Local community) uses could be resisted, see 'controlling the mix of use' later in this section.

Meeting needs over the plan period

- 5.14 It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the latest NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. Identifying opportunities to meet needs for ten years or the full plan period is not a critical issue in East Hampshire because the updated long-term floorspace projections are much lower than those suggested in the RMTCUS 2018, and vacant space could accommodate a significant amount of the future projected need for new facilities up to 2040.
- 5.15 In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required. The NPPF's presumption in favour of sustainable development (paragraph 11) remains. For plan-making this means that:
- plans should promote sustainable patterns of development that meet the needs of their area; and
 - policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas.
- 5.16 The preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, accounting for relevant market signals (paragraph 31).
- 5.17 The previous Draft Local Plan correctly indicated the need for new retail floorspace can be met through the completion of commitments and the re-occupation of vacant floorspace, and with any residual capacity met on other development opportunities in Alton, White & Borden and Liphook. However, the Draft Local Plan's Spatial Strategy Policy S1 (Quanta and location of development) referred to new retail being directed to town centres to maintain their vitality and viability and that new retail floorspace would be delivered. This reference to 'retail' could be expanded to refer to leisure and other main town centre uses, consistent with the floorspace projections in this update.

Impact and sequential tests

- 5.18 The NPPF (paragraph 90) states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:
- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 5.19 The NPPF (paragraph 87) indicates local planning authorities should apply a sequential test for main town centre uses, but (paragraph 89) the sequential approach should not be applied to small scale rural development.

- 5.20 The previous Draft Local Plan correctly sought to direct retail and main town centre uses to the Town, District and Local Centres, as defined in the hierarchy shown above. The sequential test applies to all main town centre uses proposed outside the designated centres and impact test should apply to all retail and leisure development centres rather than all main town centre uses as implied by Draft Local Plan Policy DM21 (Main town centre uses). The NPPF no longer requires an impact assessment for new office uses outside of designated centres.
- 5.21 The RMTCUS 2018 suggested the NPPF minimum impact threshold of 2,500 sq.m gross was inappropriate as a blanket threshold across the East Hampshire District, because this scale of development would represent a significant proportion of the overall retail projections for all centres in the District at that time. The RMTCUS concluded that retail development smaller than 2,500 sq.m gross could have a significant adverse impact, on centres within the District.
- 5.22 The vitality and viability of centres within the District has not improved significantly since 2018, particularly with the impact of Covid lockdowns and now the cost of living crisis. Furthermore, the retail floorspace projections have reduced significantly since 2018, which does not support an increase in the impact threshold. The continued adoption of a reduced threshold of 500 sq.m gross is recommended.
- 5.23 The Draft Local Plan Proposals Map identified existing and proposed new boundaries for all Town, District and Local Centres (Draft Policy S16). A Primary Shopping Area was also defined in the core area of Alton Town Centre (Draft Policy DM22), which sought to control the retail and non-retail uses mix of uses.
- 5.24 Consistent with the RMTCUS recommendations, the centre boundaries were reduced in Liphook, with two separate district and local centres defined. Also consistent with the RMTCUS, the new boundaries were reduced slightly in the other centres i.e. Alton, Clanfield, Four Marks, Grayshott Horndean and Whitehill. The slightly reduced centre boundaries are now endorsed by the lower retail floorspace projections in this update report.
- 5.25 It remains important to define centre boundaries to identify the areas that will be enhanced and protected by planning policy (Draft Policy S16) and the application of the impact and sequential tests (Draft Policy DM21). The Proposals Map centre boundaries were correctly linked to Draft Policy S16, but for the avoidance of doubt boundaries could also be linked to Draft Policy DM21, which refers to the impact and sequential tests.

Controlling the mix of uses

- 5.26 The ability to control the mix of uses within centres, primary shopping areas and/or frontages has changed significantly since the Draft Local Plan 2018 was published. Current and future market trends; the relatively low retail floorspace short term capacity projections; and changes to the NPPF and the Use Classes Order (UCO); indicate a more flexible approach to shop frontage policies and the mix of uses within centres. However, the projections suggest there is still a need to protect retail and service uses within town, district and local centres/parades to ensure they continue to meet the needs of their local communities.
- 5.27 The NPPF also suggest markets should be retained and enhanced and, where appropriate, markets could be re-introduced or create new ones created. Markets can be major attractions within town centres and provide a diverse range of stalls adding to a centre's retail offer. Alton has several markets i.e. craft market, farmers market and general street

market. Planning policies should seek to retain these markets and encourage improvements to these markets.

- 5.28 A balanced approach that recognises the need to maintain and enhance each centre’s retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. There is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and local shopping centres. However, changes to the UCO and Permitted Development Rights (PDR) will restrict the future policy approach.
- 5.29 The UCO/PDR changes prevent a more restrictive approach. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA), but Article 4 directions cannot prevent movement within the same use class i.e., within the new Class E.
- 5.30 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre. Demand from retail occupiers has reduced and the updated retail floorspace projections are much lower than previous projections, particularly comparison goods retail. However, there is no evidence of high concentrations of vacant units in East Hampshire. Local Plan policies should seek to retain retail and services uses, recognising the constraints introduced by the UCO/PDR changes.
- 5.31 Draft Policy DM20 (Town, district and local centres) sought to control changes of use of ground floor premises in centres. The effectiveness of this draft policy will be reduced by the UCO and PDR changes highlighted above, but the principles of the policy remain valid.
- 5.32 Future policy should indicate should continue to manage the mix of uses and protect the vitality and viability of centres and parades. Policy should indicate the retail offer will be enhanced within the Alton primary shopping area and Class E should be retained whilst maintaining an active frontage. A wider range of main town centre uses including Class E, Sui Generis and Class F should also be protected elsewhere in the town centre and in district and local centres and parades.
- 5.33 To achieve these aims, future policy should encourage proposals for Class E uses within centres and parades, but recognising proposals for Sui Generis and Class F may be appropriate. Proposals that require planning permission that would result in the loss of these uses at ground floor level could only be permitted subject to criteria relating to:
- the absence of need or viability of the existing use;
 - individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre/parade;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E, Sui Generis and Class F uses.
- 5.34 Encouraging Class E uses will include main town centre uses not previously permitted at ground floor level e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be encouraged where appropriate i.e., preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. This approach will allow appropriate flexibility in centres.

- 5.35 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.
- 5.36 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 5.37 Draft Policy DM22 (Alton Primary Shopping Area) sought to retain the retail function of the PSA and the controls went further than Draft Policy DM20. This draft policy is no longer enforceable due to the UCO and PDR changes. However, the new Local Plan could still designate a Primary Shopping Area (PSA) in Alton Town Centre to manage the mix of uses and protect the vitality and viability of the centre. Within the Alton PSA the retail offer could still be protected and uses within Class E could be retained whilst maintaining an active frontage. Within other parts of the town centres, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected, in line with Draft Policy DM20.
- 5.38 Future policy should recognise the important role played by local and village centres and parades in serving day to day needs. Changes of use that would result in a reduction in shopping facilities will be restricted and the continued use for Class E and other main town centre uses could be supported, subject to local need and marketing criteria.

6.0 Conclusions and recommendations

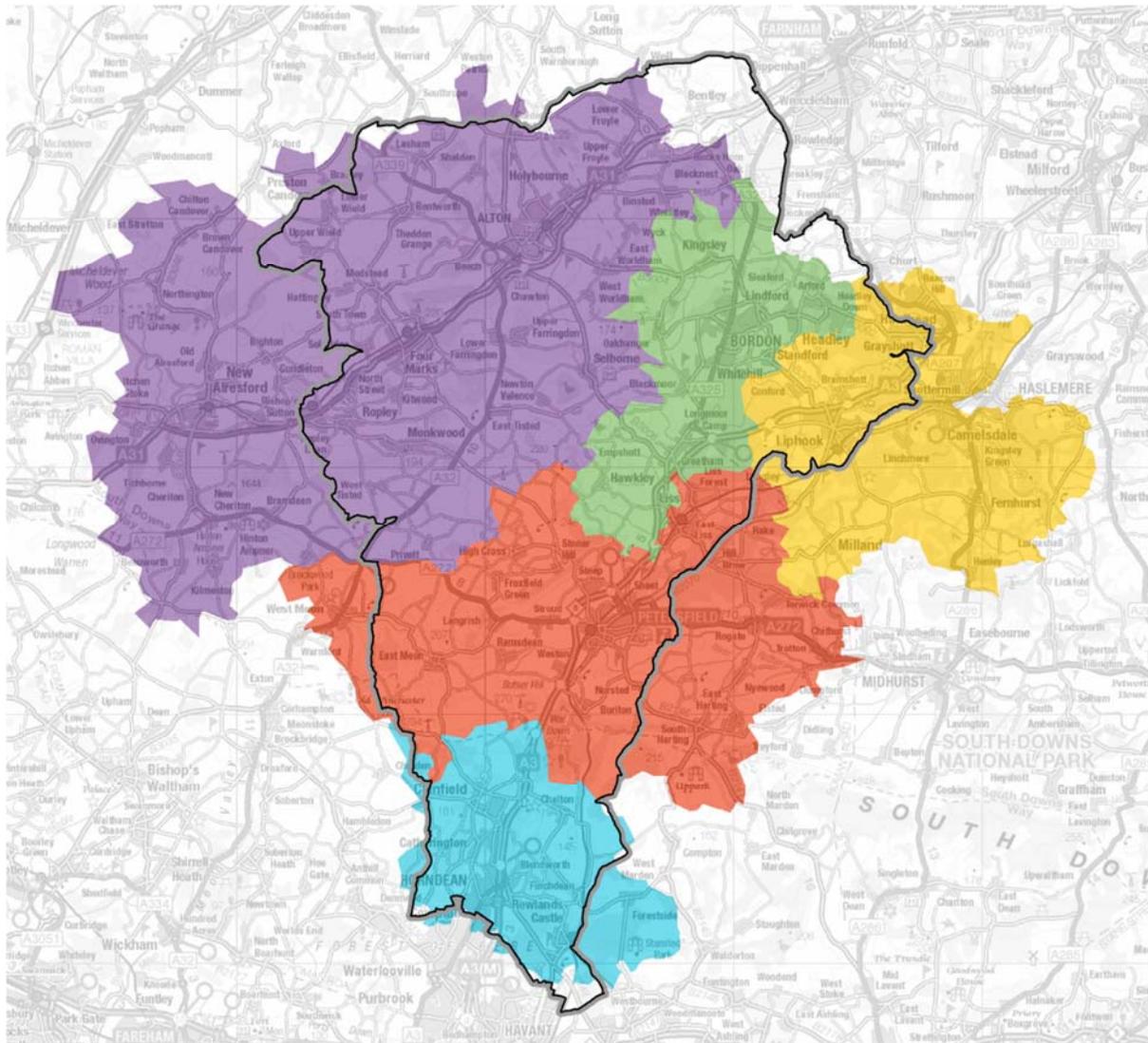
Accommodating growth

- 6.1 This update report indicates the projected capacity for retail and food/beverage floorspace has reduced significantly since the RMTCUS 2018 was prepared. The updated projections suggest a mix of comparison and convenience goods retail and food/beverage floorspace is required up to 2040 totalling about 3,400 sq.m gross, over and above current commitments. Emerging plan policy should indicate this residual floorspace projection can be accommodated through the re-occupation of vacant floorspace in town centres and potential further phases of development at the new Borden town centre.
- 6.2 The implementation of the proposed food store at the Borden town centre should be supported, along with other elements of the Phase 1 development i.e. 1,150 sq.m gross of other retail/service use and 2,080 sq.m gross of Food/beverage uses. In the longer term there may be scope for a further 1,500 sq.m gross at Borden in later phase of development, which could include further convenience good retail floorspace and food/beverage floorspace, although this potential longer term requirement will need to be monitored and reviewed.

Policy options

- 6.3 Based on the scale of facilities available within each settlement and the updated retail floorspace projections, the retail hierarchy proposed in the Draft Local Plan 2017 – 2036 (Regulation 18) remains appropriate and sound.
- 6.4 The NPPF minimum impact threshold of 2,500 sq.m gross is still an inappropriate blanket threshold across East Hampshire District. The Draft Local Plan retained a lower threshold of 500 sq.m gross, which is endorsed by the updated (lower) floorspace capacity projections and recent market conditions.
- 6.5 Emerging plan policy should define town and local centre boundaries on the Proposals Map, as identified in the Draft Local Plan. The centre boundaries should provide sufficient clarification in relation to the need for an impact and sequential assessment and should be linked to relevant policies that seeks to maintain and improve the vitality and viability of centres and the application of the impact and sequential tests. The Local Plan should identify local parades and smaller neighbourhood centres that perform an important role.
- 6.6 Current and future market trends, the lower retail floorspace capacity projections, changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centres can be adopted. However, the projections suggest there is still a need to protect retail and service uses within town, district and local centres/parades to ensure they continue to meet the needs of their local communities.

Appendix 1 Study area zones



Key

 East Hampshire Local Authority Boundary

Zones

-  Zone 1 - Alton
-  Zone 2 - Whitehill & Bordon
-  Zone 3 - Liphook
-  Zone 4 - Petersfield
-  Zone 5 - Horndean

Appendix 2 Convenience retail capacity

Table 1 - Study area population

	2023	2025	2030	2035	2040
Zone 1 - Alton	46,027	46,536	47,528	48,349	48,989
Zone 2 - Whitehill & Bordon	27,096	27,476	28,260	28,915	29,606
Zone 3 - Liphook	31,920	32,176	32,788	33,202	33,653
Zone 4 - Petersfield	31,038	31,313	31,870	32,287	32,635
Zone 5 - Horndean	28,816	29,167	29,885	30,443	30,957
Total	164,897	166,668	170,331	173,196	175,840

Sources: *Experian 2022*

Table 2 - Convenience goods expenditure per person per annum (£)

	2023	2025	2030	2035	2040
Zone 1 - Alton	2,736	2,711	2,704	2,716	2,734
Zone 2 - Whitehill & Bordon	2,506	2,482	2,476	2,487	2,504
Zone 3 - Liphook	2,794	2,768	2,761	2,773	2,792
Zone 4 - Petersfield	2,735	2,710	2,703	2,715	2,734
Zone 5 - Horndean	2,631	2,607	2,600	2,612	2,630

Sources:
Experian Local Expenditure 2021 base year (2021 prices)
Experian expenditure projections - Retail Planner Briefing Note 20 (February 2023)
Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total convenience goods expenditure (£m)

	2023	2025	2030	2035	2040
Zone 1 - Alton	125.93	126.16	128.52	131.32	133.94
Zone 2 - Whitehill & Bordon	67.90	68.20	69.97	71.91	74.13
Zone 3 - Liphook	89.18	89.06	90.53	92.07	93.96
Zone 4 - Petersfield	84.89	84.86	86.14	87.66	89.22
Zone 5 - Horndean	75.81	76.04	77.70	79.52	81.42
Total	443.72	444.31	452.86	462.47	472.67

Source: *Tables 1 and 2*

Table 4 - Convenience goods market shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Alton	49.5%	16.3%	0.5%	0.5%	0.0%	5.0%
Whitehill & Bordon	0.0%	54.4%	5.9%	1.1%	0.0%	5.0%
Liphook	0.3%	10.6%	37.3%	4.6%	0.0%	5.0%
Clanfield	0.0%	0.0%	0.0%	0.3%	5.1%	1.0%
Four Marks	4.7%	0.2%	0.0%	0.0%	0.0%	1.0%
Grayshott	0.0%	1.7%	6.5%	0.0%	0.3%	1.0%
Horndean	0.3%	0.9%	1.2%	1.9%	32.9%	5.0%
Other East Hampshire District	0.6%	3.2%	0.0%	0.0%	2.7%	1.0%
East Hampshire District Total	55.4%	87.3%	51.4%	8.4%	41.0%	n/a
Petersfield	5.6%	2.9%	4.6%	74.6%	3.7%	n/a
Farnham	2.7%	5.5%	2.4%	0.0%	0.3%	n/a
Waterlooville	1.7%	0.9%	0.4%	4.3%	47.3%	n/a
Havant	0.0%	0.0%	0.0%	1.6%	4.2%	n/a
Winchester	15.8%	0.0%	0.0%	0.3%	0.0%	n/a
Haslemere	1.3%	1.0%	32.4%	0.3%	1.2%	n/a
Other outside of District	17.5%	2.4%	8.8%	10.5%	2.3%	n/a
Other Total	44.6%	12.7%	48.6%	91.6%	59.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base year 2023 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2023	125.93	67.90	89.18	84.89	75.81		443.72
Alton	62.34	11.07	0.45	0.42	0.00	3.91	78.18
Whitehill & Bordon	0.00	36.94	5.26	0.93	0.00	2.27	45.40
Liphook	0.38	7.20	33.27	3.90	0.00	2.36	47.10
Clanfield	0.00	0.00	0.00	0.25	3.87	0.04	4.16
Four Marks	5.92	0.14	0.00	0.00	0.00	0.06	6.12
Grayshott	0.00	1.15	5.80	0.00	0.23	0.07	7.25
Horndean	0.38	0.61	1.07	1.61	24.94	1.51	30.12
Other East Hampshire District	0.76	2.17	0.00	0.00	2.05	0.05	5.03
East Hampshire District total	69.77	59.28	45.84	7.13	31.08	10.27	223.37
Petersfield	7.05	1.97	4.10	63.33	2.81	n/a	79.26
Farnham	3.40	3.73	2.14	0.00	0.23	n/a	9.50
Waterlooville	2.14	0.61	0.36	3.65	35.86	n/a	42.62
Havant	0.00	0.00	0.00	1.36	3.18	n/a	4.54
Winchester	19.90	0.00	0.00	0.25	0.00	n/a	20.15
Haslemere	1.64	0.68	28.90	0.25	0.91	n/a	32.38
Other outside of District	22.04	1.63	7.85	8.91	1.74	n/a	42.17
Other total	56.16	8.62	43.34	77.76	44.73		230.62
TOTAL	125.93	67.90	89.18	84.89	75.81	10.27	453.99

Source: Tables 3 and 4

Table 6 - Future 2025 convenience goods expenditure patterns (£M) - no development

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	126.16	68.20	89.06	84.86	76.04		444.31
Alton	62.45	11.12	0.45	0.42	0.00	3.92	78.35
Whitehill & Bordon	0.00	37.10	5.25	0.93	0.00	2.28	45.56
Liphook	0.38	7.23	33.22	3.90	0.00	2.35	47.09
Clanfield	0.00	0.00	0.00	0.25	3.88	0.04	4.17
Four Marks	5.93	0.14	0.00	0.00	0.00	0.06	6.13
Grayshott	0.00	1.16	5.79	0.00	0.23	0.07	7.25
Horndean	0.38	0.61	1.07	1.61	25.02	1.51	30.20
Other East Hampshire District	0.76	2.18	0.00	0.00	2.05	0.05	5.04
East Hampshire District total	69.89	59.53	45.78	7.13	31.18	10.29	223.80
Petersfield	7.06	1.98	4.10	63.30	2.81	n/a	79.26
Farnham	3.41	3.75	2.14	0.00	0.23	n/a	9.52
Waterlooville	2.14	0.61	0.36	3.65	35.97	n/a	42.73
Havant	0.00	0.00	0.00	1.36	3.19	n/a	4.55
Winchester	19.93	0.00	0.00	0.25	0.00	n/a	20.19
Haslemere	1.64	0.68	28.86	0.25	0.91	n/a	32.35
Other outside of District	22.08	1.64	7.84	8.91	1.75	n/a	42.21
Other total	56.27	8.66	43.28	77.73	44.86		230.81
TOTAL	126.16	68.20	89.06	84.86	76.04	10.29	454.60

Source: Tables 3 and 4

Table 7 - Convenience goods retail commitments trade draw and turnover

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trade draw %							
Lidl, Mill Lane Alton	74.0%	20.0%	1.0%	0.0%	0.0%	5.0%	100.0%
Home Bargains, Mill Lane, Alton	74.0%	20.0%	1.0%	0.0%	0.0%	5.0%	100.0%
Morrison's, Bordon town centre	0.0%	70.0%	25.0%	0.0%	0.0%	5.0%	100.0%
Land East of Hordean - local centre	0.0%	0.0%	0.0%	5.0%	90.0%	5.0%	100.0%
Trade draw £M							
Lidl, Mill Lane Alton (1)	£6.76	£1.83	£0.09	£0.00	£0.00	£0.46	£9.13
Home Bargains, Mill Lane, Alton (2)	£2.41	£0.65	£0.03	£0.00	£0.00	£0.16	£3.25
Morrison's, Bordon town centre (3)	£0.00	£10.89	£3.89	£0.00	£0.00	£0.78	£15.55
Land East of Hordean - local centre (4)	£0.00	£0.00	£0.00	£0.21	£3.78	£0.21	£4.20
Total trade draw £M	£9.16	£13.36	£4.01	£0.21	£3.78	£1.61	£32.13

(1) Lidl store - 1,308 sq.m net with 80% convenience goods sales and average sales density of £8,730 psm.

(2) Home Bargains store - 1,255 sq.m net with 45% convenience goods sales and average sales density of £5,744 psm.

(3) Morrison's store - 1,600 sq.m net with 80% convenience goods sales and average sales density of £12,150 psm.

(4) Convenience store - 350 sq.m net and average sales density of £12,000 psm.

Table 8 - Future 2025 convenience goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	126.16	68.20	89.06	84.86	76.04		444.31
Mill Lane, Alton commitment	9.16	2.48	0.12	0.00	0.00	0.62	12.38
Bordon town centre commitment	0.00	10.89	3.89	0.00	0.00	0.78	15.55
Land east of Horndean commitment	0.00	0.00	0.00	0.21	3.78	0.21	4.20
Alton	56.48	10.48	0.44	0.42	0.00	3.68	71.49
Whitehill & Bordon	0.00	26.43	4.69	0.92	0.00	1.58	33.61
Liphook	0.23	5.56	30.34	3.85	0.00	1.78	41.77
Clanfield	0.00	0.00	0.00	0.25	3.73	0.04	4.03
Four Marks	5.65	0.13	0.00	0.00	0.00	0.06	5.84
Grayscott	0.00	1.13	5.73	0.00	0.22	0.07	7.14
Horndean	0.34	0.58	1.05	1.61	23.15	1.42	28.14
Other East Hampshire District	0.72	2.12	0.00	0.00	1.98	0.05	4.87
East Hampshire District total	72.58	59.78	46.25	7.26	32.85	10.29	229.01
Petersfield	6.73	1.92	4.05	63.20	2.71	n/a	78.60
Farnham	3.24	3.64	2.11	0.00	0.22	n/a	9.22
Waterlooville	2.04	0.60	0.35	3.64	34.62	n/a	41.25
Havant	0.00	0.00	0.00	1.36	3.07	n/a	4.43
Winchester	18.98	0.00	0.00	0.25	0.00	n/a	19.23
Haslemere	1.56	0.66	28.54	0.25	0.88	n/a	31.90
Other outside of District	21.02	1.59	7.75	8.89	1.68	n/a	40.94
Other total	53.58	8.41	42.82	77.60	43.18		225.59
TOTAL	126.16	68.20	89.06	84.86	76.04	10.29	454.60

Source: Tables 6 and 7

Table 9 - Future 2030 convenience goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	128.52	69.97	90.53	86.14	77.70		452.86
Alton	66.87	13.29	0.57	0.43	0.00	4.38	85.53
Whitehill & Bordon	0.00	38.28	8.71	0.93	0.00	2.41	50.33
Liphook	0.24	5.71	30.84	3.91	0.00	1.81	42.51
Clanfield	0.00	0.00	0.00	0.26	3.81	0.04	4.11
Four Marks	5.75	0.14	0.00	0.00	0.00	0.06	5.95
Grayscott	0.00	1.16	5.82	0.00	0.22	0.07	7.27
Hordean	0.35	0.59	1.06	1.84	27.51	2.89	34.25
Other East Hampshire District	0.73	2.17	0.00	0.00	2.02	0.05	4.98
East Hampshire District total	73.94	61.34	47.01	7.37	33.57	11.72	234.95
Petersfield	6.85	1.97	4.12	64.15	2.77	n/a	79.86
Farnham	3.30	3.74	2.15	0.00	0.22	n/a	9.42
Waterlooville	2.08	0.61	0.36	3.70	35.38	n/a	42.13
Havant	0.00	0.00	0.00	1.38	3.14	n/a	4.52
Winchester	19.33	0.00	0.00	0.26	0.00	n/a	19.59
Haslemere	1.59	0.68	29.01	0.26	0.90	n/a	32.44
Other outside of District	21.42	1.63	7.88	9.03	1.72	n/a	41.68
Other total	54.58	8.63	43.52	78.77	44.13		229.63
TOTAL	128.52	69.97	90.53	86.14	77.70	11.72	464.58

Source: Tables 3 and 8

Table 10 - Future 2035 convenience goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	131.32	71.91	92.07	87.66	79.52		462.47
Alton	68.32	13.66	0.58	0.44	0.00	4.47	87.47
Whitehill & Bordon	0.00	39.34	8.86	0.95	0.00	2.46	51.61
Liphook	0.24	5.87	31.37	3.98	0.00	1.85	43.31
Clanfield	0.00	0.00	0.00	0.26	3.90	0.04	4.21
Four Marks	5.88	0.14	0.00	0.00	0.00	0.06	6.08
Grayscott	0.00	1.19	5.92	0.00	0.23	0.07	7.41
Hordean	0.36	0.61	1.08	1.88	28.16	2.95	35.03
Other East Hampshire District	0.75	2.23	0.00	0.00	2.07	0.05	5.10
East Hampshire District total	75.55	63.04	47.81	7.50	34.36	11.96	240.22
Petersfield	7.00	2.03	4.19	65.28	2.83	n/a	81.33
Farnham	3.38	3.84	2.19	0.00	0.23	n/a	9.63
Waterlooville	2.13	0.63	0.36	3.76	36.20	n/a	43.09
Havant	0.00	0.00	0.00	1.40	3.21	n/a	4.61
Winchester	19.76	0.00	0.00	0.26	0.00	n/a	20.02
Haslemere	1.63	0.70	29.51	0.26	0.92	n/a	33.01
Other outside of District	21.88	1.68	8.01	9.19	1.76	n/a	42.52
Other total	55.77	8.87	44.26	80.16	45.16		234.22
TOTAL	131.32	71.91	92.07	87.66	79.52	11.96	474.44

Source: Tables 3 and 8

Table 11 - Future 2040 convenience goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	133.94	74.13	93.96	89.22	81.42		472.67
Alton	69.69	14.08	0.59	0.44	0.00	4.57	89.37
Whitehill & Bordon	0.00	40.56	9.04	0.96	0.00	2.51	53.08
Liphook	0.25	6.05	32.01	4.05	0.00	1.89	44.25
Clanfield	0.00	0.00	0.00	0.27	4.00	0.04	4.31
Four Marks	5.99	0.14	0.00	0.00	0.00	0.06	6.20
Grayscott	0.00	1.22	6.04	0.00	0.24	0.07	7.58
Horndean	0.36	0.63	1.10	1.91	28.83	3.02	35.85
Other East Hampshire District	0.77	2.30	0.00	0.00	2.12	0.05	5.24
East Hampshire District total	77.06	64.99	48.79	7.63	35.18	12.23	245.88
Petersfield	7.14	2.09	4.28	66.45	2.90	n/a	82.85
Farnham	3.44	3.96	2.23	0.00	0.24	n/a	9.87
Waterlooville	2.17	0.65	0.37	3.83	37.07	n/a	44.09
Havant	0.00	0.00	0.00	1.43	3.29	n/a	4.72
Winchester	20.15	0.00	0.00	0.27	0.00	n/a	20.42
Haslemere	1.66	0.72	30.11	0.27	0.94	n/a	33.70
Other outside of District	22.32	1.73	8.18	9.35	1.80	n/a	43.38
Other total	56.88	9.14	45.17	81.59	46.24		239.02
TOTAL	133.94	74.13	93.96	89.22	81.42	12.23	484.90

Source: Tables 3 and 8

Table 12 - Main food stores convenience goods floorspace in East Hampshire (2021 prices)

Area/Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Alton					
Sainsbury's, Draymans Way, Alton	3,318	75%	2,489	£14,411	£35.86
Marks & Spencer Foodhall, High Street, Alton	960	95%	912	£10,888	£9.93
Waitrose, Station Road, Alton	1,535	90%	1,382	£13,706	£18.93
Iceland, High Street, Alton	729	98%	714	£6,665	£4.76
Co-op, High Street, Alton	157	95%	149	£11,301	£1.69
Tesco Express, Anstey Lane, Alton	141	95%	134	£13,477	£1.81
Aldi, Alton Retail Park	902	85%	767	£10,904	£8.36
Other Alton	1,200	100%	1,200	£7,000	£8.40
	8,942		7,746		£89.74
Whitehill & Bordon					
Tesco, High Street, Whitehill & Bordon	1,596	90%	1,436	£13,477	£19.36
Lidl, Forest Centre, Whitehill & Bordon	975	85%	829	£8,730	£7.23
Other Whitehill and Bordon	200	100%	200	£7,000	£1.40
	2,771		2,465		£27.99
Liphook					
Sainsbury's, Midhurst Road, Liphook	2,282	85%	1,940	£14,411	£27.95
Co-op, Headley Road, Liphook	293	95%	278	£11,301	£3.15
Other Liphook	200	100%	200	£7,000	£1.40
	2,775		2,418		£32.50
Clanfield					
Co-op, White Dirt Lane, Clanfield	278	95%	264	£11,301	£2.98
Budgens, Green Lane, Clanfield	139	90%	125	£7,936	£0.99
Other Cranfield	200	100%	200	£7,000	£1.40
	617		589		£5.38
Four Marks					
Co-op, Winchester Road, Four Marks	156	95%	148	£11,301	£1.67
Tesco Express, Winchester Road, Four Marks	168	95%	160	£13,477	£2.15
M&S Simply Food, BP Garage, Four Marks	84	95%	80	£10,888	£0.87
Other Four Marks	100	100%	100	£7,000	£0.70
	508		488		£5.39
Grayshott					
Co-op, Headley Road, Grayshott	305	95%	290	£11,301	£3.27
Sainsbury's Local, Headley Road, Grayshott	238	95%	226	£14,411	£3.26
Other Grayshott	100	100%	100	£7,000	£0.70
	643		616		£7.23
Hordean					
Morrisons, Lakesmere Road, Hordean	2,809	80%	2,247	£12,150	£27.30
Other Hordean	200	100%	200	£7,000	£1.40
	3,009		2,447		£28.70
TOTAL	19,265		16,769		£196.94

Source: ORC Storepoint 2023 and Global Data 2022

Table 13 Summary of convenience goods expenditure 2023 to 2040 (£M)

	2023	2025	2030	2035	2040
Available expenditure					
Alton	78.18	83.87	85.53	87.47	89.37
Whitehill & Bordon	45.40	49.16	50.33	51.61	53.08
Liphook	47.10	41.77	42.51	43.31	44.25
Clanfield	4.16	4.03	4.11	4.21	4.31
Four Marks	6.12	5.84	5.95	6.08	6.20
Grayshott	7.25	7.14	7.27	7.41	7.58
Horndean	30.12	32.34	34.25	35.03	35.85
Other	5.03	4.87	4.98	5.10	5.24
Total	223.37	229.01	234.95	240.22	245.88
Turnover of existing facilities/commitments					
Alton	89.74	104.72	105.14	105.14	105.14
Whitehill & Bordon	27.99	44.36	44.53	44.53	44.53
Liphook	32.50	33.44	33.58	33.58	33.58
Clanfield	5.38	5.53	5.56	5.56	5.56
Four Marks	5.39	5.55	5.57	5.57	5.57
Grayshott	7.23	7.44	7.47	7.47	7.47
Horndean	28.70	33.74	33.87	33.87	33.87
Other	5.03	5.17	5.19	5.19	5.19
Total	201.96	239.96	240.92	240.92	240.92
Surplus/deficit expenditure £M					
Alton	-11.56	-20.85	-19.61	-17.67	-15.77
Whitehill & Bordon	17.41	4.81	5.80	7.08	8.55
Liphook	14.60	8.33	8.94	9.73	10.67
Clanfield	-1.21	-1.51	-1.44	-1.35	-1.25
Four Marks	0.72	0.29	0.37	0.50	0.63
Grayshott	0.02	-0.30	-0.20	-0.06	0.10
Horndean	1.42	-1.40	0.38	1.16	1.98
Other	0.00	-0.31	-0.21	-0.09	0.04
Total	21.40	-10.94	-5.97	-0.70	4.96

Source: Tables 5 to 12

Table 14 - Convenience goods floorspace capacity

	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,060	£12,060	£12,060
Floorspace Projection (sq.m net)				
Alton	-1,738	-1,626	-1,466	-1,308
Whitehill & Bordon	401	481	587	709
Liphook	694	741	807	885
Clanfield	-125	-120	-112	-104
Four Marks	24	31	42	52
Grayshott	-25	-17	-5	9
Horndean	-117	32	96	164
Other	-26	-18	-7	4
Total	-912	-495	-58	411
Floorspace Projection (sq.m gross)				
Alton	-2,482	-2,323	-2,094	-1,868
Whitehill & Bordon	572	687	838	1,012
Liphook	992	1,059	1,153	1,264
Clanfield	-179	-171	-160	-148
Four Marks	34	44	60	74
Grayshott	-36	-24	-7	12
Horndean	-167	45	137	235
Other	-36	-25	-11	5
Total	-1,303	-708	-83	587

Source: Table 13

Appendix 3 Comparison retail capacity

Table 1 - Study area population

	2023	2025	2030	2035	2040
Zone 1 - Alton	46,027	46,536	47,528	48,349	48,989
Zone 2 - Whitehill & Bordon	27,096	27,476	28,260	28,915	29,606
Zone 3 - Liphook	31,920	32,176	32,788	33,202	33,653
Zone 4 - Petersfield	31,038	31,313	31,870	32,287	32,635
Zone 5 - Horndean	28,816	29,167	29,885	30,443	30,957
Total	164,897	166,668	170,331	173,196	175,840

Sources: *Experian 2022*

Table 2 - Comparison goods expenditure per person per annum (£)

	2023	2025	2030	2035	2040
Zone 1 - Alton	3,458	3,483	3,833	4,361	5,004
Zone 2 - Whitehill & Bordon	3,180	3,202	3,524	4,009	4,601
Zone 3 - Liphook	3,592	3,617	3,981	4,529	5,197
Zone 4 - Petersfield	3,435	3,459	3,807	4,331	4,969
Zone 5 - Horndean	3,437	3,462	3,810	4,335	4,974

Sources:

Experian Local Expenditure 2021 base year (2021 prices)

Experian expenditure projections - Retail Planner Briefing Note 20 (February 2023)

Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total comparison goods expenditure (£m)

	2023	2025	2030	2035	2040
Zone 1 - Alton	159.16	162.08	182.17	210.85	245.14
Zone 2 - Whitehill & Bordon	86.17	87.98	99.59	115.92	136.22
Zone 3 - Liphook	114.66	116.38	130.53	150.37	174.89
Zone 4 - Petersfield	106.62	108.31	121.33	139.83	162.16
Zone 5 - Horndean	99.04	100.98	113.86	131.97	153.98
Total	565.64	575.73	647.48	748.95	872.40

Source: *Tables 1 and 2*

Table 4 - Comparison goods market shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Alton	18.7%	5.3%	0.5%	0.4%	0.0%	10.0%
Whitehill & Bordon	0.5%	9.8%	1.2%	0.2%	1.0%	5.0%
Liphook	0.0%	2.0%	9.2%	0.5%	0.0%	5.0%
Grayscott	0.0%	1.2%	2.1%	0.0%	0.0%	5.0%
Other East Hampshire District	0.6%	1.1%	0.1%	2.4%	3.7%	5.0%
East Hampshire District Total	19.8%	19.4%	13.1%	3.5%	4.7%	n/a
Petersfield	1.4%	6.7%	11.6%	40.3%	6.6%	n/a
Farnham	2.8%	7.9%	1.6%	0.3%	0.5%	n/a
Waterlooville	0.5%	3.8%	1.2%	8.5%	36.6%	n/a
Havant	0.0%	1.1%	1.1%	5.8%	8.2%	n/a
Winchester	28.8%	0.0%	0.0%	5.0%	0.1%	n/a
Haslemere	0.2%	2.8%	15.2%	0.5%	0.0%	n/a
Other outside of District	46.5%	58.3%	56.2%	36.1%	43.3%	n/a
Other Total	80.2%	80.6%	86.9%	96.5%	95.3%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base year 2023 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2023	159.16	86.17	114.66	106.62	99.04		565.64
Alton	29.76	4.57	0.57	0.43	0.00	3.93	39.26
Whitehill & Bordon	0.80	8.44	1.38	0.21	0.99	0.62	12.44
Liphook	0.00	1.72	10.55	0.53	0.00	0.67	13.48
Grayscott	0.00	1.03	2.41	0.00	0.00	0.18	3.62
Other East Hampshire District	0.95	0.95	0.11	2.56	3.66	0.43	8.67
East Hampshire District total	31.51	16.72	15.02	3.73	4.65	5.84	77.47
Petersfield	2.23	5.77	13.30	42.97	6.54	n/a	70.80
Farnham	4.46	6.81	1.83	0.32	0.50	n/a	13.91
Waterlooville	0.80	3.27	1.38	9.06	36.25	n/a	50.76
Havant	0.00	0.95	1.26	6.18	8.12	n/a	16.51
Winchester	45.84	0.00	0.00	5.33	0.10	n/a	51.27
Haslemere	0.32	2.41	17.43	0.53	0.00	n/a	20.69
Other outside of District	74.01	50.23	64.44	38.49	42.88	n/a	270.05
Other total	127.65	69.45	99.64	102.88	94.39		494.00
TOTAL	159.16	86.17	114.66	106.62	99.04	5.84	571.48

Source: Tables 3 and 4

Table 6 - Future 2025 comparison goods expenditure patterns (£M) - no development

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	162.08	87.98	116.38	108.31	100.98		575.73
Alton	30.31	4.66	0.58	0.43	0.00	4.00	39.99
Whitehill & Bordon	0.81	8.62	1.40	0.22	1.01	0.63	12.69
Liphook	0.00	1.76	10.71	0.54	0.00	0.68	13.69
Grayshott	0.00	1.06	2.44	0.00	0.00	0.18	3.68
Other East Hampshire District	0.97	0.97	0.12	2.60	3.74	0.44	8.83
East Hampshire District total	32.09	17.07	15.25	3.79	4.75	5.94	78.89
Petersfield	2.27	5.89	13.50	43.65	6.66	n/a	71.98
Farnham	4.54	6.95	1.86	0.32	0.50	n/a	14.18
Waterlooville	0.81	3.34	1.40	9.21	36.96	n/a	51.71
Havant	0.00	0.97	1.28	6.28	8.28	n/a	16.81
Winchester	46.68	0.00	0.00	5.42	0.10	n/a	52.20
Haslemere	0.32	2.46	17.69	0.54	0.00	n/a	21.02
Other outside of District	75.37	51.29	65.41	39.10	43.72	n/a	274.89
Other total	129.99	70.91	101.13	104.52	96.23		502.79
TOTAL	162.08	87.98	116.38	108.31	100.98	5.94	581.68

Source: Tables 3 and 4

Table 7 - Comparison goods retail commitments trade draw and turnover

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trade draw %							
Lidl, Mill Lane Alton	80.0%	13.0%	1.0%	1.0%	0.0%	5.0%	100.0%
Home Bargains, Mill Lane, Alton	80.0%	13.0%	1.0%	1.0%	0.0%	5.0%	100.0%
Unit 2, Mill Lane Alton	80.0%	13.0%	1.0%	1.0%	0.0%	5.0%	100.0%
Morrison's, Bordon town centre	0.0%	77.0%	15.0%	3.0%	0.0%	5.0%	100.0%
Other retail, Bordon town centre	0.0%	77.0%	15.0%	3.0%	0.0%	5.0%	100.0%
Trade draw £M							
Lidl, Mill Lane Alton (1)	£1.02	£0.17	£0.01	£0.01	£0.00	£0.06	£1.27
Home Bargains, Mill Lane, Alton (2)	£3.17	£0.51	£0.04	£0.04	£0.00	£0.20	£3.96
Unit 2, Mill Lane Alton (3)	£1.90	£0.31	£0.02	£0.02	£0.00	£0.12	£2.38
Morrison's, Bordon town centre (4)	£0.00	£1.50	£0.29	£0.06	£0.00	£0.10	£1.95
Other retail, Bordon town centre (5)	£0.00	£4.25	£0.83	£0.17	£0.00	£0.28	£5.52
Total trade draw £M	£6.09	£6.74	£1.20	£0.30	£0.00	£0.75	£15.08

(1) Lidl store - 1,308 sq.m net with 20% comparison goods sales and average sales density of £4,865 psm.

(2) Home Bargains store - 1,255 sq.m net with 55% comparison goods sales and average sales density of £5,744 psm.

(3) Unit 2 - 744 sq.m gross and 595 sq.m net with an average sales density of £4,000 psm.

(4) Morrison's store - 1,600 sq.m net with 20% comparison goods sales and average sales density = £6,105 psm.

(5) Other retail - 1,150 sq.m gross and 920 sq.m net and an average sales density = £6,000 psm.

Table 8 - Future 2025 comparison goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	162.08	87.98	116.38	108.31	100.98		575.73
Mill Lane, Alton commitment	6.56	0.68	0.05	0.05	0.00	0.26	7.61
Bordon town centre commitment	0.00	5.75	1.12	0.22	0.00	0.37	7.47
Alton	29.08	4.32	0.58	0.43	0.00	3.57	37.98
Whitehill & Bordon	0.78	7.99	1.38	0.22	1.01	0.57	11.94
Liphook	0.00	1.63	10.60	0.54	0.00	0.61	13.38
Grayshott	0.00	0.98	2.42	0.00	0.00	0.16	3.56
Other East Hampshire District	0.93	0.90	0.12	2.59	3.74	0.39	8.67
East Hampshire District total	37.36	22.25	16.27	4.06	4.75	5.94	90.62
Petersfield	2.18	5.46	13.36	43.54	6.66	n/a	71.21
Farnham	4.35	6.44	1.84	0.32	0.50	n/a	13.47
Waterlooville	0.78	3.10	1.38	9.18	36.96	n/a	51.40
Havant	0.00	0.90	1.27	6.27	8.28	n/a	16.71
Winchester	44.79	0.00	0.00	5.40	0.10	n/a	50.29
Haslemere	0.31	2.28	17.51	0.54	0.00	n/a	20.65
Other outside of District	72.32	47.54	64.75	39.00	43.72	n/a	267.33
Other total	124.73	65.73	100.12	104.25	96.23		491.05
TOTAL	162.08	87.98	116.38	108.31	100.98	5.94	581.68

Source: Tables 6 and 7

Table 9 - Future 2030 comparison goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	182.17	99.59	130.53	121.33	113.86		647.48
Alton	40.06	5.66	0.70	0.54	0.00	4.31	51.28
Whitehill & Bordon	0.87	15.56	2.81	0.49	1.14	1.06	21.93
Liphook	0.00	1.85	11.89	0.61	0.00	0.69	15.03
Grayshott	0.00	1.11	2.71	0.00	0.00	0.19	4.01
Other East Hampshire District	1.05	1.02	0.13	2.90	4.21	0.44	9.75
East Hampshire District total	41.99	25.19	18.24	4.55	5.35	6.68	102.00
Petersfield	2.45	6.18	14.99	48.77	7.51	n/a	79.91
Farnham	4.89	7.29	2.07	0.36	0.57	n/a	15.19
Waterlooville	0.87	3.51	1.55	10.29	41.67	n/a	57.89
Havant	0.00	1.02	1.42	7.02	9.34	n/a	18.79
Winchester	50.34	0.00	0.00	6.05	0.11	n/a	56.51
Haslemere	0.35	2.58	19.64	0.61	0.00	n/a	23.18
Other outside of District	81.28	53.82	72.62	43.69	49.30	n/a	300.70
Other total	140.19	74.40	112.29	116.78	108.51		552.17
TOTAL	182.17	99.59	130.53	121.33	113.86	6.68	654.17

Source: Tables 3 and 8

Table 10 - Future 2035 comparison goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	210.85	115.92	150.37	139.83	131.97		748.95
Alton	46.37	6.59	0.81	0.63	0.00	4.99	59.38
Whitehill & Bordon	1.01	18.11	3.23	0.57	1.32	1.22	25.47
Liphook	0.00	2.15	13.69	0.70	0.00	0.80	17.34
Grayshott	0.00	1.29	3.13	0.00	0.00	0.21	4.63
Other East Hampshire District	1.21	1.18	0.15	3.35	4.88	0.51	11.29
East Hampshire District total	48.60	29.32	21.02	5.24	6.20	7.73	118.10
Petersfield	2.83	7.20	17.27	56.21	8.71	n/a	92.22
Farnham	5.66	8.49	2.38	0.42	0.66	n/a	17.61
Waterlooville	1.01	4.08	1.79	11.86	48.30	n/a	67.04
Havant	0.00	1.18	1.64	8.09	10.82	n/a	21.73
Winchester	58.27	0.00	0.00	6.97	0.13	n/a	65.37
Haslemere	0.40	3.01	22.63	0.70	0.00	n/a	26.74
Other outside of District	94.07	62.64	83.66	50.35	57.14	n/a	347.87
Other total	162.25	86.60	129.36	134.60	125.77		638.58
TOTAL	210.85	115.92	150.37	139.83	131.97	7.73	756.68

Source: Tables 3 and 8

Table 11 - Future 2040 comparison goods expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	245.14	136.22	174.89	162.16	153.98		872.40
Alton	53.91	7.74	0.94	0.73	0.00	5.81	69.13
Whitehill & Bordon	1.18	21.28	3.76	0.66	1.54	1.42	29.84
Liphook	0.00	2.53	15.93	0.81	0.00	0.93	20.19
Grayshott	0.00	1.52	3.64	0.00	0.00	0.25	5.40
Other East Hampshire District	1.41	1.39	0.17	3.88	5.70	0.60	13.15
East Hampshire District total	56.50	34.45	24.44	6.08	7.24	9.01	137.71
Petersfield	3.29	8.46	20.08	65.19	10.16	n/a	107.18
Farnham	6.59	9.97	2.77	0.49	0.77	n/a	20.59
Waterlooville	1.18	4.80	2.08	13.75	56.36	n/a	78.16
Havant	0.00	1.39	1.90	9.38	12.63	n/a	25.30
Winchester	67.74	0.00	0.00	8.09	0.15	n/a	75.98
Haslemere	0.47	3.54	26.32	0.81	0.00	n/a	31.13
Other outside of District	109.37	73.61	97.30	58.39	66.67	n/a	405.35
Other total	188.64	101.76	150.45	156.09	146.74		743.69
TOTAL	245.14	136.22	174.89	162.16	153.98	9.01	881.40

Source: Tables 3 and 8

Table 12 Summary of comparison goods expenditure 2023 to 2040 (£M)

	2023	2025	2030	2035	2040
Available expenditure					
Alton	39.26	45.59	51.28	59.38	69.13
Whitehill & Bordon	12.44	19.41	21.93	25.47	29.84
Liphook	13.48	13.38	15.03	17.34	20.19
Grayshott	3.62	3.56	4.01	4.63	5.40
Other	8.67	8.67	9.75	11.29	13.15
Total	77.47	90.62	102.00	118.10	137.71
Turnover of existing facilities/commitments					
Alton	39.26	47.49	52.84	60.67	69.65
Whitehill & Bordon	12.44	20.11	22.38	25.69	29.49
Liphook	13.48	13.69	15.24	17.49	20.08
Grayshott	3.62	3.68	4.10	4.70	5.40
Other	8.67	8.81	9.81	11.26	12.92
Total	77.47	93.79	104.36	119.81	137.55
Surplus/deficit expenditure £M					
Alton	0.00	-1.90	-1.56	-1.28	-0.52
Whitehill & Bordon	0.00	-0.70	-0.45	-0.22	0.35
Liphook	0.00	-0.31	-0.21	-0.16	0.11
Grayshott	0.00	-0.12	-0.09	-0.07	0.00
Other	0.00	-0.14	-0.05	0.03	0.23
Total	0.00	-3.17	-2.36	-1.71	0.16

Source: Tables 5 to 11

Table 13 - Comparison goods floorspace capacity

	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,624	£7,605	£8,731
Floorspace Projection (sq.m net)				
Alton	-316	-235	-169	-59
Whitehill & Bordon	-116	-68	-30	40
Liphook	-52	-32	-21	12
Grayshott	-20	-13	-10	0
Other	-24	-8	4	26
Total	-528	-356	-225	19
Floorspace Projection (sq.m gross)				
Alton	-421	-314	-225	-79
Whitehill & Bordon	-155	-90	-39	53
Liphook	-69	-42	-27	16
Grayshott	-26	-18	-13	0
Other	-32	-10	5	34
Total	-703	-475	-299	25

Source: Table 12

Appendix 4 Food/beverage capacity

Table 1 - Study area population

	2023	2025	2030	2035	2040
Zone 1 - Alton	46,027	46,536	47,528	48,349	48,989
Zone 2 - Whitehill & Bordon	27,096	27,476	28,260	28,915	29,606
Zone 3 - Liphook	31,920	32,176	32,788	33,202	33,653
Zone 4 - Petersfield	31,038	31,313	31,870	32,287	32,635
Zone 5 - Horndean	28,816	29,167	29,885	30,443	30,957
Total	164,897	166,668	170,331	173,196	175,840

Sources: *Experian 2022*

Table 2 - Food and beverage expenditure per person per annum (£)

	2023	2025	2030	2035	2040
Zone 1 - Alton	1,907	1,922	2,018	2,111	2,208
Zone 2 - Whitehill & Bordon	1,700	1,713	1,799	1,881	1,967
Zone 3 - Liphook	2,020	2,036	2,138	2,236	2,338
Zone 4 - Petersfield	1,950	1,965	2,063	2,158	2,257
Zone 5 - Horndean	1,877	1,892	1,986	2,077	2,172

Sources:
Experian Local Expenditure 2021 (2021 prices)
Experian expenditure projections - Retail Planner Briefing Note 20 (February 2023)

Table 3 - Total food and beverage expenditure (£m)

	2023	2025	2030	2035	2040
Zone 1 - Alton	87.77	89.44	95.91	102.06	108.17
Zone 2 - Whitehill & Bordon	46.06	47.07	50.84	54.39	58.24
Zone 3 - Liphook	64.48	65.51	70.10	74.24	78.68
Zone 4 - Petersfield	60.52	61.53	65.75	69.68	73.66
Zone 5 - Horndean	54.09	55.18	59.35	63.23	67.24
Total	312.93	318.73	341.95	363.60	385.98

Source: *Tables 1 and 2*

Table 4 - Base year Food and beverage market shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow
Alton	34.7%	10.6%	0.4%	0.0%	0.0%	5.0%
Whitehill & Bordon	0.0%	9.2%	0.0%	0.0%	0.0%	1.0%
Liphook	0.0%	4.8%	13.9%	0.6%	0.0%	1.0%
Clanfield	0.0%	0.0%	0.0%	0.0%	9.9%	1.0%
Grayshott	0.0%	4.3%	8.8%	0.0%	0.0%	1.0%
Hordean	0.0%	0.0%	0.0%	0.0%	18.2%	1.0%
Other East Hampshire District	5.2%	2.0%	0.0%	0.0%	3.9%	1.0%
East Hampshire District Total	39.9%	30.9%	23.1%	0.6%	32.0%	n/a
Petersfield	4.2%	3.7%	7.8%	74.8%	7.0%	n/a
Farnham	3.9%	9.8%	1.8%	0.0%	0.0%	n/a
Waterlooville	0.0%	0.9%	0.0%	0.0%	13.9%	n/a
Havant	0.0%	0.0%	0.8%	2.0%	1.8%	n/a
Winchester	18.0%	1.7%	0.0%	0.9%	0.9%	n/a
Haslemere	0.0%	6.2%	16.6%	0.0%	0.0%	n/a
Other outside of District	34.0%	46.8%	49.9%	21.7%	44.4%	n/a
Other Total	60.1%	69.1%	76.9%	99.4%	68.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base year 2023 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2023	87.77	46.06	64.48	60.52	54.09		312.93
Alton	30.46	4.88	0.26	0.00	0.00	1.87	37.47
Whitehill & Bordon	0.00	4.24	0.00	0.00	0.00	0.04	4.28
Liphook	0.00	2.21	8.96	0.36	0.00	0.12	11.65
Clanfield	0.00	0.00	0.00	0.00	5.35	0.05	5.41
Grayshott	0.00	1.98	5.67	0.00	0.00	0.08	7.73
Horndean	0.00	0.00	0.00	0.00	9.84	0.10	9.94
Other East Hampshire District	4.56	0.92	0.00	0.00	2.11	0.08	7.67
East Hampshire District total	35.02	14.23	14.89	0.36	17.31	2.34	84.16
Petersfield	3.69	1.70	5.03	45.27	3.79	n/a	59.48
Farnham	3.42	4.51	1.16	0.00	0.00	n/a	9.10
Waterlooville	0.00	0.41	0.00	0.00	7.52	n/a	7.93
Havant	0.00	0.00	0.52	1.21	0.97	n/a	2.70
Winchester	15.80	0.78	0.00	0.54	0.49	n/a	17.61
Haslemere	0.00	2.86	10.70	0.00	0.00	n/a	13.56
Other outside of District	29.84	21.56	32.17	13.13	24.01	n/a	120.72
Other total	52.75	31.83	49.58	60.16	36.78		231.11
TOTAL	87.77	46.06	64.48	60.52	54.09	2.34	315.27

Source: Tables 3 and 4

Table 6 - Future 2025 food and beverage expenditure patterns (£M) - no development

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	89.44	47.07	65.51	61.53	55.18		318.73
Alton	31.04	4.99	0.26	0.00	0.00	1.91	38.20
Whitehill & Bordon	0.00	4.33	0.00	0.00	0.00	0.04	4.37
Liphook	0.00	2.26	9.11	0.37	0.00	0.12	11.85
Clanfield	0.00	0.00	0.00	0.00	5.46	0.06	5.52
Grayshott	0.00	2.02	5.76	0.00	0.00	0.08	7.87
Horndean	0.00	0.00	0.00	0.00	10.04	0.10	10.14
Other East Hampshire District	4.65	0.94	0.00	0.00	2.15	0.08	7.82
East Hampshire District total	35.69	14.54	15.13	0.37	17.66	2.39	85.78
Petersfield	3.76	1.74	5.11	46.02	3.86	n/a	60.50
Farnham	3.49	4.61	1.18	0.00	0.00	n/a	9.28
Waterlooville	0.00	0.42	0.00	0.00	7.67	n/a	8.09
Havant	0.00	0.00	0.52	1.23	0.99	n/a	2.75
Winchester	16.10	0.80	0.00	0.55	0.50	n/a	17.95
Haslemere	0.00	2.92	10.87	0.00	0.00	n/a	13.79
Other outside of District	30.41	22.03	32.69	13.35	24.50	n/a	122.98
Other total	53.75	32.52	50.38	61.16	37.53		235.34
TOTAL	89.44	47.07	65.51	61.53	55.18	2.39	321.12

Source: Tables 3 and 4

Table 7 - Food and beverage commitments trade draw and turnover

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trade draw %							
Bordon town centre	0.0%	80.0%	15.0%	0.0%	0.0%	5.0%	100.0%
Land east of Horndean	0.0%	0.0%	0.0%	5.0%	90.0%	5.0%	100.0%
Trade draw £M							
Bordon town centre (1)	£0.00	£9.98	£1.87	£0.00	£0.00	£0.62	£12.48
Land east of Horndean local centre (2)	£0.00	£0.00	£0.00	£0.30	£5.40	£0.30	£6.00

(1) Food/beverage floorspace - 2,080 sq.m gross with an average sales density = £6,000 psm.

(2) Food/beverage floorspace - 1,000 sq.m gross with an average sales density = £6,000 psm.

Table 8 - Future 2025 food and beverage expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2025	89.44	47.07	65.51	61.53	55.18		318.73
Bordon town centre commitment	0.00	9.98	1.87	0.00	0.00	0.62	12.48
Horndean local centre commitment	0.00	0.00	0.00	0.30	5.40	0.30	6.00
Alton	31.04	3.93	0.25	0.00	0.00	1.17	36.39
Whitehill & Bordon	0.00	3.41	0.00	0.00	0.00	0.03	3.44
Liphook	0.00	1.78	8.85	0.37	0.00	0.07	11.07
Clanfield	0.00	0.00	0.00	0.00	4.93	0.03	4.96
Grayshott	0.00	1.59	5.60	0.00	0.00	0.05	7.24
Horndean	0.00	0.00	0.00	0.00	9.06	0.06	9.12
Other East Hampshire District	4.65	0.74	0.00	0.00	1.94	0.05	7.38
East Hampshire District total	35.69	21.44	16.57	0.67	21.33	2.39	98.09
Petersfield	3.76	1.37	4.96	45.80	3.48	n/a	59.38
Farnham	3.49	3.63	1.15	0.00	0.00	n/a	8.27
Waterlooville	0.00	0.33	0.00	0.00	6.92	n/a	7.25
Havant	0.00	0.00	0.51	1.22	0.90	n/a	2.63
Winchester	16.10	0.63	0.00	0.55	0.45	n/a	17.73
Haslemere	0.00	2.30	10.56	0.00	0.00	n/a	12.86
Other outside of District	30.41	17.35	31.76	13.29	22.10	n/a	114.91
Other total	53.75	25.62	48.94	60.86	33.85		223.03
TOTAL	89.44	47.07	65.51	61.53	55.18	2.39	321.12

Source: Tables 6 and 7

Table 9 - Future 2030 food and beverage expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2030	95.91	50.84	70.10	65.75	59.35		341.95
Alton	33.28	4.25	0.27	0.00	0.00	1.26	39.05
Whitehill & Bordon	16.82	0.00	1.00	0.00	0.00	0.70	18.52
Liphook	0.00	1.92	9.47	0.39	0.00	0.08	11.86
Clanfield	0.00	0.00	0.00	0.00	5.30	0.04	5.34
Grayshott	0.00	1.72	5.99	0.00	0.00	0.05	7.77
Horndean	0.00	0.00	0.00	0.32	15.55	0.39	16.26
Other East Hampshire District	4.99	0.80	0.00	0.00	2.09	0.05	7.93
East Hampshire District total	55.09	8.69	16.73	0.71	22.94	2.56	106.73
Petersfield	4.03	1.48	5.31	48.94	3.75	n/a	63.51
Farnham	3.74	3.93	1.23	0.00	0.00	n/a	8.89
Waterlooville	0.00	0.36	0.00	0.00	7.44	n/a	7.80
Havant	0.00	0.00	0.54	1.31	0.96	n/a	2.82
Winchester	17.26	0.68	0.00	0.59	0.48	n/a	19.02
Haslemere	0.00	2.48	11.30	0.00	0.00	n/a	13.79
Other outside of District	32.61	18.75	33.98	14.20	23.77	n/a	123.31
Other total	57.64	27.68	52.37	65.03	36.41		239.13
TOTAL	112.73	36.37	69.10	65.75	59.35	2.56	345.86

Source: Tables 3 and 8

Table 10 - Future 2035 food and beverage expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2035	102.06	54.39	74.24	69.68	63.23		363.60
Alton	35.42	4.54	0.29	0.00	0.00	1.33	41.58
Whitehill & Bordon	17.68	0.00	1.00	0.00	0.00	0.74	19.42
Liphook	0.00	2.06	10.02	0.42	0.00	0.08	12.58
Clanfield	0.00	0.00	0.00	0.00	5.65	0.04	5.69
Grayshott	0.00	1.84	6.35	0.00	0.00	0.05	8.24
Horndean	0.00	0.00	0.00	0.34	16.57	0.41	17.32
Other East Hampshire District	5.31	0.86	0.00	0.00	2.22	0.05	8.44
East Hampshire District total	58.40	9.30	17.66	0.76	24.44	2.72	113.28
Petersfield	4.29	1.59	5.63	51.86	3.99	n/a	67.35
Farnham	3.98	4.20	1.30	0.00	0.00	n/a	9.48
Waterlooville	0.00	0.39	0.00	0.00	7.93	n/a	8.31
Havant	0.00	0.00	0.58	1.39	1.03	n/a	2.99
Winchester	18.37	0.73	0.00	0.62	0.51	n/a	20.24
Haslemere	0.00	2.66	11.97	0.00	0.00	n/a	14.63
Other outside of District	34.70	20.05	35.99	15.05	25.33	n/a	131.12
Other total	61.34	29.61	55.46	68.92	38.79		254.12
TOTAL	119.74	38.91	73.12	69.68	63.23	2.72	367.40

Source: Tables 3 and 8

Table 11 - Future 2040 food and beverage expenditure patterns (£M) - with commitments

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Expenditure 2040	108.17	58.24	78.68	73.66	67.24		385.98
Alton	37.53	4.86	0.31	0.00	0.00	1.42	44.12
Whitehill & Bordon	18.53	0.00	1.00	0.00	0.00	0.79	20.32
Liphook	0.00	2.20	10.62	0.44	0.00	0.09	13.35
Clanfield	0.00	0.00	0.00	0.00	6.01	0.04	6.05
Grayshott	0.00	1.97	6.73	0.00	0.00	0.06	8.76
Horndean	0.00	0.00	0.00	0.36	17.62	0.44	18.42
Other East Hampshire District	5.62	0.92	0.00	0.00	2.37	0.06	8.97
East Hampshire District total	61.69	9.96	18.66	0.80	25.99	2.89	119.98
Petersfield	4.54	1.70	5.96	54.83	4.25	n/a	71.28
Farnham	4.22	4.50	1.38	0.00	0.00	n/a	10.09
Waterlooville	0.00	0.41	0.00	0.00	8.43	n/a	8.84
Havant	0.00	0.00	0.61	1.47	1.09	n/a	3.17
Winchester	19.47	0.78	0.00	0.66	0.55	n/a	21.46
Haslemere	0.00	2.84	12.69	0.00	0.00	n/a	15.53
Other outside of District	36.78	21.47	38.14	15.91	26.93	n/a	139.23
Other total	65.01	31.70	58.78	72.86	41.25		269.60
TOTAL	126.70	41.66	77.43	73.66	67.24	2.89	389.58

Source: Tables 3 and 8

Table 12 Summary of food and beverage expenditure 2023 to 2040 (£M)

	2023	2025	2030	2035	2040
Available expenditure					
Alton	37.47	36.39	39.05	41.58	44.12
Whitehill & Bordon	4.28	15.92	18.52	19.42	20.32
Liphook	11.65	11.07	11.86	12.58	13.35
Clanfield	5.41	4.96	5.34	5.69	6.05
Grayshott	7.73	7.24	7.77	8.24	8.76
Horndean	9.94	15.12	16.26	17.32	18.42
Other	7.67	7.38	7.93	8.44	8.97
Total	84.16	98.09	106.73	113.28	119.98
Turnover of existing facilities/commitments					
Alton	37.47	37.36	38.04	38.42	38.80
Whitehill & Bordon	4.28	16.75	17.05	17.22	17.40
Liphook	11.65	11.62	11.83	11.95	12.07
Clanfield	5.41	5.39	5.49	5.55	5.60
Grayshott	7.73	7.71	7.85	7.93	8.01
Horndean	9.94	15.91	16.20	16.36	16.53
Other	7.67	7.65	7.79	7.87	7.94
Total	84.16	102.39	104.24	105.29	106.35
Surplus/deficit expenditure £M					
Alton	0.00	-0.97	1.02	3.16	5.32
Whitehill & Bordon	0.00	-0.83	1.47	2.20	2.92
Liphook	0.00	-0.55	0.03	0.63	1.29
Clanfield	0.00	-0.43	-0.15	0.14	0.45
Grayshott	0.00	-0.47	-0.08	0.32	0.75
Horndean	0.00	-0.79	0.06	0.96	1.89
Other	0.00	-0.27	0.14	0.58	1.02
Total	0.00	-4.30	2.48	7.99	13.63

Source: Tables 5 to 11

Table 13 - Food and beverage floorspace capacity

	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,024	£6,085	£6,146
Floorspace Projection (sq.m gross)				
Alton	-161	169	520	865
Whitehill & Bordon	-138	244	362	476
Liphook	-92	5	104	209
Clanfield	-72	-25	23	72
Grayshott	-78	-14	52	122
Horndean	-132	10	157	307
Other	-44	23	95	166
Total	-717	412	1,313	2,219

Source: Table 12

Celebrating

60
years

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