



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Retail Update 2012

Retail and Town Centre Uses Study

Christchurch East Dorset Councils

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Contents

1.0	Introduction	1
	Background	1
	Report Structure	1
2.0	Recent Changes and Trends	2
	The Need for the Study Update	2
	The National Planning Policy Framework	2
	The Economic Downturn.....	5
	Retail Trends	5
	Leisure Trends	7
3.0	Quantitative Scope for Retail Floorspace	11
	Introduction	11
	Methodology and Data.....	11
	Existing Retail Floorspace	13
	Existing Spending Patterns 2012	13
	Quantitative Capacity for Convenience Floorspace	16
	Quantitative Capacity for Comparison Floorspace	16
	Retail Floorspace Projections	17
4.0	Commercial Leisure Assessment	19
	Introduction	19
	Cinemas	19
5.0	Conclusions	25

Appendices

Appendix A	Study Area and Retail Facilities
Appendix B	Convenience Assessment
Appendix C	Comparison Assessment

1.0 **Introduction**

Background

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Christchurch Borough Council, East Dorset District Council, North Dorset District Council and Purbeck District Council to prepare a Joint Retail Assessment in March 2008. NLP was subsequently commissioned to undertake an additional Retail Study for the settlements of Corfe Mullen and West Parley in East Dorset in November 2008.
- 1.2 Due to recent changes in population projections and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned by Christchurch BC and East Dorset DC to update the 2008 study, focusing on the two authority areas.
- 1.3 It is not considered necessary to update the findings of previous studies in relation to the network of centres, centre health checks and centre boundaries, because these remain relatively up to date and the conclusions remain robust.
- 1.4 This 2012 report provides an update, identifying recent changes and trends in retail planning, including the National Planning Policy Framework (NPPF) and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. The report also reviews the capacity for Christchurch's and East Dorset's centres to accommodate growth. It provides recommendations on the retail impact floorspace thresholds and non-A1 thresholds within primary shopping cores.
- 1.5 This report should therefore be read alongside the 2008 retail studies.

Report Structure

- 1.6 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 sets out the updated retail capacity and quantitative need assessment. Section 4 assesses the need for commercial leisure uses.

2.0 **Recent Changes and Trends**

The Need for the Study Update

- 2.1 The previous Joint Retail Assessments (2008) provided projections up to 2026 and these figures now need to be updated. This update covers the plan period up to 2028.
- 2.2 Central government guidance in PPS6, and PPS4 has been replaced by the NPPF and this will have implications for plan making and development control decisions.

The National Planning Policy Framework

- 2.3 The 2008 Studies were based on the guidance set out in PPS6 'Planning for Town Centres' (2005). This guidance was replaced by PPS4: 'Planning for Sustainable Growth' published in December 2009, and has now been superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).
- 2.4 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):
- Local planning authorities should positively seek opportunities to meet development needs of their area;
 - Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted.
- 2.5 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).
- 2.6 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
 - take account of the different roles and character of different areas, promoting the vitality of main urban areas;
 - encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.
- 2.7 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).
- 2.8 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:
- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
 - the role and function of town centres and the relationship between them, including any trends in the performance of centres.
 - the capacity of existing centres to accommodate new development.
- 2.9 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:
- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.10 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.11 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.12 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

- 2.13 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

Rural Policy

- 2.14 The NPPF states that in relation to the rural economy, local and neighbourhood plans should promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship (para. 28).

The Economic Downturn

- 2.15 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.
- 2.16 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the Local Plan period. This study takes a long term view for the Local Plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

- 2.17 A revised assessment of the need for retail facilities in both Christchurch Borough and East Dorset District is set out in Section 3.0 of this report. This section provides an overview of national trends within the retail sector.

Expenditure Growth

- 2.18 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.
- 2.19 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990's. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail

floorspace. We anticipate these national trends will be mirrored in Christchurch and East Dorset.

New Forms of Retailing

- 2.20 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Dorset. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Christchurch and East Dorset.
- 2.21 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 9 (Sept 2011)). Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:
- "Growth in internet shopping has exceeded our expectations. Online spending increased in real terms by 18% in 2010 in line with the forecast in Retail Planner 8 of August 2010. However, 2011 has seen expansion continue at this impressive pace, despite the squeeze on consumers, rather than easing as in our previous forecast. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales in the next few years, but we now expect that market share holds constant from 2018 (rather than 2016). Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point."*
- 2.22 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.
- 2.23 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

- 2.24 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are now fewer DIY operators and B&Q and Homebase have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.
- 2.25 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.
- 2.26 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the Districts. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.
- 2.27 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in Christchurch Borough and East Dorset District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.
- 2.28 Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Bournemouth, Southampton and Salisbury. Demand from multiples within the Borough and District's town centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

Leisure Trends

- 2.29 The demand for commercial leisure facilities increased significantly during the last 25 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005. However growth has been more limited since 2005. Experian (Retail Planner Briefing Note 9 – September 2011) indicates expenditure on leisure services fell by 10% between 2005 and 2010. Some analysts consider that the commercial leisure market has now reached saturation in some sub-sectors, e.g. bingo, multiplex cinemas and tenpin bowling.
- 2.30 Experian forecasts that expenditure on leisure services will remain static between 2010 to 2013, but will grow by an average of 0.8% per annum between 2013 to 2018. The longer term growth rate beyond 2018 is 1% per annum.

2.31 The mid-1990s to early 2000s saw the expansion of major leisure parks. These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. This type of development has been focused in larger towns, such as Southampton.

Cinemas

2.32 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas in recent years.

2.33 Cinema admissions in the UK 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, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million, but dropped to 156.6 million in 2006. There was a recovery to 173.5 million trips in 2009 and this has remained relatively stable up to 2011.

2.34 The number of cinemas reduced from 775 in 2002 to 761 in 2011, however the number of screens and seats increased from 3,402 to 3,824 and 734,511 to 802,614 respectively. Multiplex cinemas now dominate the market with over 70% of available screens.

2.35 Given the limited growth in cinema trips during the last ten years, and the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis shifted to consolidation and modest physical expansion.

2.36 The current (2011) UK annual average is 44,800 trips per screen or 213 trips per seat. This has dropped from 51,700 trips per screen and 239 trips per seat in 2002.

Other Leisure Sectors

2.37 The expansion of other sectors has also slowed, including ten-pin bowling and bingo. However, other sub-sectors have continued to grow albeit at a slower rate in recent years, in particular the private health and fitness market. Nevertheless, the health and fitness sector is also reaching saturation point in some areas and is likely to be affected by the current down turn in the economy.

- 2.38 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2009 Handbook indicated healthy growth across the industry with the Fitness Industry Report stating that by March 2008, there were 5,755 combined public and private sector fitness sites across the UK. Between 2007 and 2009, 41 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.
- 2.39 About 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue.
- 2.40 Private health clubs in the UK range from small independent clubs to large operators such as Nuffield Health, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.
- 2.41 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.
- 2.42 The tenpin bowling sector experienced steady growth, 13% real growth between 1997 and 2002. Mintel estimated the value of the tenpin bowling market increased from £245 million in 2002 to £324 million by 2007.
- 2.43 There were 269 tenpin bowling centres (5,005 lanes) in the UK in 2007, approximately one lane per 12,000 people. Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.
- 2.44 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.
- 2.45 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. The decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase. Bingo is seen as a working class, female pastime and often undertaken by older players. However the market has changed. Younger and more affluent people have been attracted. It remains a niche activity at heart but attracts between 3-4 million players.

- 2.46 The number of commercial bingo clubs in the UK decreased from 676 in 2005, to 616 in 2008. At present there is one club per 100,000 people. Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult each year. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week).
- 2.47 Mecca and Gala 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.
- 2.48 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL).

Bars and Restaurants

- 2.49 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 2.1.

Table 2.1 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 2000 to 2011	Proportion of Total Number of Units (%)			
		2000	2005	2009	2011
Class A1 (Retail)	- 15.4	59.1	56.4	54.0	50.0
Class A1 (Services)	+ 31.7	8.2	9.6	9.8	10.8
Class A2	- 4.5	8.9	8.9	9.0	8.5
Class A3/A5*	+ 41.1	11.2	13.7	14.5	15.8
Miscellaneous	-14.3	1.4	1.4	1.3	1.2
Vacant/under Const.	+22.3	11.2	10.1	11.4	13.7
Total	-	100.0	100.0	100.0	100.0

Source: Goad Centre Reports

*excludes Bars/Public houses (A4)

- 2.50 The proportion of Class A1 retail uses in Goad town centres has decreased by 15% between 2000 to 2011 (9.1 percentage points), whilst Class A3/A5 uses and vacant units have increased. Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

3.0 **Quantitative Scope for Retail Floorspace**

Introduction

- 3.1 This section assesses the quantitative scope for new retail floorspace in Christchurch Borough and East Dorset District up to 2028, and sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.
- 3.2 All monetary values expressed in this analysis are at 2010 prices unless stated otherwise. The previous 2008 NLP study was based on 2005 prices, therefore the expenditure and turnover figures in this report are not directly comparable with the figures in the 2008 Joint Retail Study.
- 3.3 The 2008 Study provided projections from 2007 to 2011, 2016, 2021 and 2026. The projections in this report have been rolled forward and figures are provided from 2012 to 2018, 2023 and 2028.

Methodology and Data

- 3.4 The quantitative analysis is based on the study area defined for the main centres in Christchurch Borough and East Dorset District in the 2008 NLP Study. In the 2008 Study the relevant part of the study area was divided into eight zones for more detailed analysis.
- 3.5 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of major competing shopping destinations i.e. shopping facilities within the study area are expected to attract a significant proportion of their trade from residents within the study area.
- 3.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area zones have been obtained.
- 3.7 Experian's EBS national expenditure information has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.
- 3.8 Experian's average annual growth forecasts for the period after 2013, i.e. 0.55% per annum for convenience goods and 3% for comparison goods.

Population

- 3.9 Office of National Statistic's Sub-National Population Projections (SNPP) 2010 have been adopted. The study area population 2010 to 2028 is set out in Table 1 in Appendix B.

Available Spending

- 3.10 The levels of available spending are derived by combining the population in Table 1 (Appendix B) with per capita spending figures Table 2 (Appendix B) for convenience goods and comparison goods Table 2 (Appendix C).
- 3.11 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 3.12 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of Trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.
- 3.13 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3.7% and 8.8% of total convenience and comparison goods expenditure respectively in 2010. The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.
- 3.14 As a consequence of growth in population and per capita spending, baseline convenience goods spending within the study area is forecast to increase from £370.66 million in 2012 to £432.52 million in 2031, as shown in Table 3 in Appendix B.
- 3.15 Baseline comparison goods spending is forecast to increase from £552.14 million in 2012 to £942.38 million in 2028 in Table 3, Appendix C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

- 3.16 Existing convenience goods retail sales floorspace within the main settlements in Christchurch Borough and East Dorset District is 22,623 sq m net as set out in Table 4 in Appendix B, of which 14,013 sq m net is in the East Dorset District and 8,610 sq m net located within Christchurch Borough. These floorspace figures exclude comparison sales floorspace within food stores.
- 3.17 Comparison goods retail sales floorspace within the East Dorset and Christchurch local authority area, including retail warehouses is estimated as 47,034 sq m net as shown in Table 4 in Appendix C, which includes comparison sales within food stores (17,973 sq m is located within East Dorset District and 29,062 sq m in Christchurch).

Existing Spending Patterns 2012

Convenience Shopping

- 3.18 A combination of household shopper survey results undertaken in 2007, 2010 and 2011 have been used to estimate existing shopping patterns within the Study area. Estimates of market share are shown in Table 5 in Appendix B. These market shares have been adjusted to reflect the new Waitrose store in Wimborne.
- 3.19 Table 6 in Appendix B indicates that the level of convenience goods expenditure attracted to shops/stores in the study area in 2012 is estimated to be £246.30 million, of which £157.02 million is attracted to shops/ stores within East Dorset District and £89.28 million to shops/stores within Christchurch Borough.
- 3.20 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 4 in Appendix B, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 3.21 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 4 in Appendix B, for consistency with the use of goods based expenditure figures.
- 3.22 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,000 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Christchurch Borough and East Dorset DC is £220.39 million, of which £132.29 million relates to

sales floorspace within East Dorset and £88.09 million is related to Christchurch.

Table 3.1: Main Food Stores in Christchurch and East Dorset

Store/Town	Sales Floorspace sq m net
Christchurch Borough	
Waitrose, Christchurch	2135
Co-op, Christchurch	957
Marks & Spencer, Christchurch	362
Tesco Express, Christchurch	183
Lidl, Somerford Road	1,033
Sainsbury's, Christchurch	4,464
Co-op, Highcliffe	411
Tesco Express, Highcliffe	230
East Dorset District	
Sainsbury's, Ferndown	4,227
Tesco, Ferndown	3,189
Lidl, Ferndown	846
Iceland, Ferndown	500
Morrison's, Verwood	1,556
Tesco Express, Verwood	134
Waitrose, Wimborne	2,137
Co-op, Wimborne	1,310
Co-op, Smugglers Lane, Wimborne	181
Co-op, West Moors	300
Tesco Express, West Moors	144
Co-op, West Parley	248
Co-op, Wareham Road, Corfe Mullen	790
Co-op, The Parade, Corfe Mullen	272

Sources: Institute of Grocery Distribution, Goad and NLP Site Survey

3.23

The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in the main towns in the study area at 2012 is £246.30 million. These figures suggest that collectively convenience retail facilities in the study area are trading above average levels. However this varies from town to town. Most of the above average levels of trading are concentrated in Ferndown and Verwood in East Dorset. Within Christchurch Borough stores are trading at around company average.

Comparison Shopping

- 3.24 A combination of household shopper survey results undertaken in 2007 and 2011 have been used to estimate existing shopping patterns within the Study area. Estimates of market share are shown in Table 5 in Appendix C.
- 3.25 Christchurch Borough and East Dorset District attracts £182.60 million of comparison goods expenditure in 2012 (Table 6 in Appendix C).
- 3.26 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly.
- 3.27 The current level of comparison expenditure attracted to facilities in the joint study area is £182.60 million, which suggests an average turnover density of around £3,882 per sq m net (47,034 sq m net in total – see Table 4 in Appendix C). A breakdown is shown below.

Table 3.2: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2012 £ per sq m net
Ferndown	£3,500
Verwood	£5,092
Wimborne	£4,740
West Moors	£3,710
Other East Dorset	£4,252
East Dorset Average	£4,204
Christchurch	£5,060
Christchurch retail warehouses	£3,052
Highcliffe	£2,430
Christchurch Borough Average	£3,684

- 3.28 We would normally anticipate turnover densities between £4,000 to £7,000 per sq m net for high street comparison shops in town centres. The higher end of this range is usually only achieved in large successful regional centres. Retail warehouses tend to trade at a lower rate. On balance, comparison shopping facilities within Christchurch and East Dorset appear to be trading satisfactorily, but not above average.
- 3.29 In order to maintain the health and vitality of town centres in the future the turnover of existing floorspace will need to increase. A growth rate of 1.7% per annum has been adopted as recommended by Experian.

Quantitative Capacity for Convenience Floorspace

- 3.30 The level of available convenience goods expenditure in 2018, 2023 and 2028 is shown at Tables 8 to 10 in Appendix B. The future markets shares have been adjusted to reflect the implementation of the proposed enlarged Morrison's store in Verwood. Uplifted markets in Corfe Mullen and West Parley have also been adopted to reflect the provision of neighbourhood shopping facilities to service additional dwellings within urban extensions (200 dwellings in Corfe Mullen and 550 dwellings in West Parley).
- 3.31 The total level of available convenience goods expenditure available for shops in Christchurch and East Dorset between 2012 and 2028 is summarised in Table 11 (Appendix B). The benchmark turnover of existing convenience floorspace and food store commitments has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.32 Table 11 in Appendix B assumes that the benchmark turnover of convenience floorspace will not increase during 2012 to 2028 due to the recession. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing (September 2011)). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.
- 3.33 The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 12 in Appendix B. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. The projections assume that a mix of different types of floorspace would be provided i.e. large food superstores, smaller supermarkets and small shops.
- 3.34 In the study area as a whole there is currently a surplus of convenience expenditure (£25.92 million) in 2012, mostly relating to East Dorset rather than Christchurch. By 2028 there will be a surplus of £57.15 million, i.e. £37.69 million in East Dorset and £19.46 million in Christchurch. Taking into account the Morrison's commitment in Verwood.

Quantitative Capacity for Comparison Floorspace

- 3.35 The projected level of comparison goods expenditure available to shops in Christchurch and East Dorset at 2018, 2023 and 2028 is shown in Tables 8 to 10 in Appendix C. The future markets shares have been adjusted to reflect the implementation of the proposed enlarged Morrison's store in Verwood (683 sq m net, which is an increase of 363 sq m net of comparison good sales floorspace when compared with the existing store).
- 3.36 Future available expenditure is compared with the projected turnover of existing and retail facilities within the study area in order to provide estimates of surplus expenditure, as shown in Table 11 up to 2028.

3.37 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Table 10 assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted as recommended by Experian. This growth will help to ensure the vitality and viability of town centres is secured.

Retail Floorspace Projections

3.38 Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 12 in Appendix C.

3.39 Surplus convenience expenditure has been converted into net floorspace projections in Table 12, Appendix B.

3.40 Surplus comparison expenditure has been converted into net floorspace projections in Table 12, Appendix C.

3.41 These floorspace projections assume that new shopping facilities within Christchurch Borough and East Dorset can help to maintain the principal towns' current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new retail floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2018;
- the effect of Internet/home shopping on the demand for retail property;
- the level of retail operator demand for floorspace;

3.42 Projections up to 2018 are based on up-to-date forecasts, which take into account the effects of the recession. The long term floorspace projections (beyond 2018) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Medium and long term forecasts may be subject to change due to unforeseen circumstances.

3.43 Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

3.44 These projections relate to Class A1 retail uses. It may be reasonable to assume there will be scope for a further 25% floorspace in all centres in Christchurch and East Dorset over and above the comparison floorspace

projections that can be occupied by Class A2 to A5 uses and Class A1 non-retail services. The additional A2 to A5 floorspace is set out in the conclusions to this report.

4.0

Commercial Leisure Assessment

Introduction

4.1 This section assesses the potential for commercial leisure uses in Christchurch and East Dorset, including cinema/multiplex, tenpin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

4.2 Residents in Christchurch and East Dorset have good access to major leisure facilities in Bournemouth and Poole. The proximity of these major leisure facilities will limit the catchment area and potential for major leisure facilities within Christchurch and East Dorset.

Cinemas

4.3 There are three small cinemas in Christchurch and East Dorset, i.e. the Regent's Centre in Christchurch, the Tivoli in Wimborne and the Hub in Verwood. Major competing centres, including Bournemouth, Poole and Southampton have several large multiplex facilities, which will restrict the catchment area of potential additional cinema provision in Christchurch and East Dorset. To assess the demand for cinemas within Christchurch and East Dorset, we have assumed as a maximum of up to 40% of cinema trips can be retained within the area. The catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat). The results are shown in Table 4.1 below.

Table 4.1 Cinema Potential in Christchurch and East Dorset

	2012	2018	2023	2028
East Dorset Population	87,595	89,863	92,231	94,598
Christchurch Population	48,098	50,588	52,679	54,770
Market Retention	40%	40%	40%	40%
East Dorset catchment	35,038	35,945	36,892	37,839
Christchurch catchment	19,239	20,235	21,072	21,908
Cinema Screen Potential				
East Dorset	2.1	2.2	2.3	2.3
Christchurch	1.2	1.2	1.3	1.3
Cinema Seat Potential				
East Dorset	449	461	473	485
Christchurch	247	259	270	281
Existing Screen Provision				
East Dorset	2	2	2	2
Christchurch	1	1	1	1
Existing Seat Provision				
East Dorset	800	800	800	800
Christchurch	485	485	485	485

4.4 The above analysis suggests there are sufficient cinema facilities in Christchurch and East Dorset. However the three facilities in Christchurch and East Dorset (Regent's Centre, Tivoli and the Verwood Hub) are combined theatre/cinemas and show a limited number of films. There may be some potential for small cinemas, but the commercial viability of this form of development is questionable.

Private Health and Fitness Clubs

4.5 There are a number of private health and fitness clubs in Christchurch and East Dorset including:

- Priory Sports, Christchurch;
- Curves in Wimborne and Christchurch;
- Curves, Penny's Walk, Ferndown;
- Mind and Body Fitness, Wimborne;
- Women's Workout Ltd, Christchurch;
- Ladyzone in West Parley; and
- Virgin Active in Corfe Mullen.

4.6 There are also public sector sports centres with fitness facilities, including:

- Riversmeet Leisure Centre, Christchurch;
- Ferndown Leisure Centre;
- Verwood Hub and Emmanuel School,
- Queen Elizabeth Leisure Centre, Wimborne.

4.7 The Christchurch and East Dorset adult population is approximately 110,000 in 2012, which could generate demand for about 13,000 public and private membership places, based on the national average membership rate (12%). This figure and the eleven identified health and fitness clubs imply an average of around 1,200 members per club, which is slightly below the national average for private fitness clubs (1,375 members). This suggests there may be limited demand for additional provision of health and fitness clubs at present.

4.8 A future increase in membership rates and/or population growth could generate additional demand. Population growth in Christchurch and East Dorset up to 2028 (+11,000 adults) could generate demand for a further 1,300 places. There may be scope for additional health club facilities in the future due to growth in population and participation rates.

Tenpin Bowling

4.9 There are no bowling alleys in Christchurch and East Dorset, but the area's population as a whole could theoretically support about 11 lanes, based on one lane per 12,000 people, or 13 lanes in 2028. These figures assume 100% retention of tenpin bowling trips. In addition large bowling facilities in Poole and

Southampton may limit the commercial potential in Christchurch and East Dorset.

Bingo

- 4.10 Christchurch and East Dorset's population (about 110,000 adults) could generate over 190,000 admissions based on the national participation rate (1.75 per adult), compared with the average of 113,000 admissions per club.
- 4.11 There are no bingo halls in Christchurch and East Dorset, but the figures suggest there is theoretical capacity for 1-2 bingo halls. However existing bingo facilities in Bournemouth and Poole are likely to reduce the commercial viability of new facilities in Christchurch and East Dorset.

Nightclubs

- 4.12 There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people (source Mintel). Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There is one nightclub in Wimborne, but there are a number of establishments in Bournemouth. There appears to be limited potential for large nightclubs in Christchurch and East Dorset.

Casinos

- 4.13 There were 144 licensed casinos operating in Great Britain at March 2008, about one casino per 400,000 people. Attendance at casinos by members and guests was 16 million trips in 2008. There are no casinos within Christchurch and East Dorset, but Bournemouth has five casinos. Christchurch and East Dorset are unlikely to have a catchment population large enough to support a casino. It is also likely that casino operators would prefer to locate in Bournemouth or Poole.

Bars and Restaurants

- 4.14 The retail floorspace projections in this report relate to Class A1 retail uses only. The mix of uses in the four main centres in Christchurch and East Dorset is shown in Table 4.2.

Table 4.2 Christchurch and East Dorset Town Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)			
	Christchurch	Highcliffe	Ferndown	Wimborne
Class A1 (Retail)	44.7	47.0	40.4	47.1
Class A1 (Services)	12.4	20.9	16.7	14.4
Class A2	12.0	13.0	20.2	13.9
Class A4	3.2	1.7	2.6	3.2
Class A3/A5	14.7	10.4	10.5	12.3
Miscellaneous	1.8	2.6	3.5	1.1
Vacant/under Const.	11.2	4.3	6.1	8.0
Total	100.0	100.0	100.0	100.0

Source: Goad Centre Reports

- 4.15 The proportions of Class A3/A4/A5 within the four towns are within the range one would anticipate for centres of their size. Based on the typical mix of uses within town centres derived from Goad Plan information, it may be reasonable to assume there will be scope for a further 15% floorspace that can be occupied by Class A3 to A5 uses.
- 4.16 Policy KS7 of the emerging Core Strategy indicates that within the primary shopping cores, non-A1 uses should not cumulatively amount to more than 30% of ground floor units. Table 4.2 indicates that at present the proportion of non-A1 use is 31.7% in Christchurch, 27.7% in Highcliffe, 33.3% in Wimborne and 30.5% in Ferndown. The non-A1 proportions could be slightly higher than these figures because some vacant units could benefit from previous non-A1 use. All centres exceed the Policy KS7 threshold with the exception of Highcliffe.
- 4.17 The proportions above relate to the town centres as a whole (as defined by Goad). One would expect the primary shopping cores to have a lower proportion of non-A1 use than the secondary frontages, therefore the proposed 30% threshold for primary shopping frontages should provide some flexibility for changes of use and is not considered to be overly restrictive.

Theatres

- 4.18 There is one theatre in Christchurch Regent's Centre. East Dorset has three small theatres; the Tivoli in Wimborne, the Barrington Centre in Ferndown and The Hub in Verwood. The provision of theatres in Bournemouth and Poole is good.

Other Leisure, Entertainment and Cultural Facilities

- 4.19 In addition to the facilities identified above Christchurch and East Dorset have a good range of other leisure and cultural facilities including:
- Adventure Wonderland, Christchurch
 - Christchurch Castle;
 - Christchurch Priory, Christchurch;
 - Highcliffe Castle;
 - Place Mill, Christchurch;
 - Knoll Gardens, Wimborne;
 - Museum of Electricity, Christchurch;
 - Red House Museum, Christchurch;
 - Go Ape! Moors Valley Country Park, East Dorset;
 - Wimborne Model Town and Gardens;
 - Kingston Lacy House, East Dorset;
 - Honeybrook Farm, East Dorset;

- The Priests House Museum, East Dorset;
- Dorset Heavy Horse and Animal Centre, Verwood;
- Verwood Heathland Heritage Centre; and
- Walford Mill. East Dorset.

5.0 **Conclusions**

- 5.1 This report provides an update of the Christchurch Borough and East Dorset District wide needs assessment for retail and should be read alongside the 2008 Study. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Christchurch and East Dorset

- 5.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period.
- 5.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.
- 5.4 Long term forecasts up to 2028 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2018 is attributable to projected growth in spending per capita as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Study Area should also be monitored along with the effect proposals may have on the demand for additional development in Christchurch and East Dorset.

Retail Floorspace Projections

- 5.5 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Christchurch and East Dorset. The retail floorspace projections are shown below. These projections do **not** take into account the reoccupation of vacant floorspace.
- 5.6 The convenience goods floorspace projections assume Corfe Mullen and West Parley can increase their markets shares of expenditure. An uplift in market share, population and expenditure growth could support a small supermarket in Corfe Mullen (400-500 sq m net). In West Parley, where existing food store provision is more limited than in Corfe Mullen, a medium size supermarket of 800-900 sq m net could be provided.
- 5.7 The convenience goods floorspace projections suggest the expanding Morrison store in Verwood will absorb the existing expenditure surplus in Verwood, and future expenditure growth will generate only limited additional capacity over the plan period (603 sq m net). This may be sufficient to support small stores/

shops rather than a large food store. Capacity is also limited in Wimborne, particularly if provision is improved in Corfe Mullen.

5.8 In Ferndown, the Morrison's commitment in Verwood and improved facilities within West Parley will also reduce capacity. However continued growth in the second half of the plan period could accommodate a medium sized food store of 1,000 to 1,500 sq m net, or extensions to existing stores.

5.9 In Christchurch, there is limited capacity for food store development in the short term (up to 2018). The floorspace projections in Tables 4.1 do not take into account the commitment at Meteor Retail Park in Christchurch. This unimplemented permission could include a discount food store, which could have a convenience goods sales area of around 900 sq m net. The sales density of this discount store would be lower (about half) than the average assumed for new sales floorspace in the capacity figures. If this store is implemented then the convenience goods floorspace projections for Christchurch in Table 5.1 would need to reduce by around 450 sq m net. There could be scope for a large food store in Christchurch in the longer term, up to 2,300 sq m net by the end of the plan period.

Table 5.1: Convenience Goods Retail Floorspace Projections

Town	Additional Retail Floorspace Sq M Net Sales			
	2012-2018	2018-2023	2023-2028	Total 2012-2031
East Dorset				
Ferndown	689	380	376	1,445
Verwood*	223	191	189	603
Wimborne	104	184	181	469
West Moors	n/a	19	22	41
Corfe Mullen	341	54	53	448
West Parley	769	48	47	864
Sub Total	2,125	876	868	3,869
Christchurch				
Christchurch	1,090	608	609	2,307
Highcliffe	n/a	n/a	n/a	n/a
Sub total	1,090	608	609	2,307
Joint Area Total	3,215	1,484	1,477	6,176

Note - figures assume the expanded Morrison's store is implemented in Verwood (floorspace projections are over and above this commitment) and uplifted shares for new neighbourhood facilities in Corfe Mullen and West Parley.

Table 5.2: Comparison Goods Retail Floorspace Projections

Town	Additional Retail Floorspace Sq M Net Sales			
	2012-2018	2018-2023	2023-2028	Total 2012-2031
East Dorset				
Ferndown	404	550	595	1,549
Verwood	456	140	152	748
Wimborne	655	889	965	2,509
West Moors	50	69	74	193
East Dorset other	52	70	76	198
Sub Total	1,617	1,718	1,824	5,197
Christchurch				
Christchurch	2,146	2,598	2,828	7,572
Highcliffe	148	179	194	521
Sub total	2,294	2,777	3,022	8,093
Joint Area Total	3,911	4,495	4,846	13,290

Note - figures assume the expanded Morrison's store is implemented in Verwood and will uplift the town's market share, but floorspace projections do not take into account the commitment at Verwood.

- 5.10 The floorspace projections in Tables 5.2 do not take into account the commitment or vacant retail warehouse floorspace at Meteor Retail Park in Christchurch, or the expanded Morrison's store in Verwood.
- 5.11 The expanded Morrison's store is expected to increase comparison sales floorspace by 363 sq m net. If implemented this figure should be subtracted from the Verwood floorspace projections in Table 5.2. This commitment would absorb most of the short term projection for Verwood up to 2018.
- 5.12 The extant planning permission at the Meteor retail park site could accommodate between 3,691 sq m gross to 4,857 sq m gross of comparison floorspace, depending on the inclusion of a discount food store. The net sales floorspace could be approximately 3,137 sq m net to 4,128 sq m net. The sales density of this retail warehouse floorspace would be lower (about half) than the average assumed for new sales floorspace in the capacity figures. If this permission is implemented then the comparison goods floorspace projections for Christchurch in Table 5.2 would need to reduce by between 1,550 to 2,050 sq m net. This commitment would absorb most if not all of the capacity in Christchurch up to 2018.
- 5.13 Allowing for the Meteor Retail Park, the remaining capacity over the plan period in Christchurch Borough would be 6,043 to 6,543 sq m net.

5.14

Table 5.3 set out below the floorspace projections for Class A2 to A5, assume an additional 25% over and above Class A1 floorspace projections shown in Tables 5.1 and 5.2. Note the figures in Table 5.3 are gross, rather than net sales shown in Table 5.1 and 5.2.

Table 5.3: Class A1 Services, Class A2 to A5 Floorspace Projections

Town	Additional Service Floorspace Sq M <u>Gross</u>			
	2012-2018	2018-2023	2023-2028	Total 2012-2031
East Dorset				
Ferndown	179	245	265	689
Verwood	203	62	67	332
Wimborne	291	395	429	1,115
West Moors	22	31	33	86
East Dorset other	23	31	34	88
Sub Total	719	763	828	2,310
Christchurch				
Christchurch	954	1,154	1,257	3,365
Highcliffe	66	79	87	232
Sub total	1,020	1,234	1,344	3,597
Joint Area Total	1,739	1,997	2,172	5,907

Commercial Leisure

5.15

Christchurch and East Dorset has a limited selection of large commercial leisure and entertainment facilities, but this reflects the relatively small catchment population of the main towns and the proximity of larger centres in Bournemouth and Poole. Residents in Christchurch and East Dorset have good access to facilities in these centres and this may limit market potential for further facilities.

5.16

Some key sectors are present including cinemas, theatres, health clubs and nightclubs. There are no ten pin bowling facilities, bingo halls or casinos within Christchurch and East Dorset. The assessment suggests that most current levels of facilities are either sufficient to support the local population or the market demand for uses are likely to be limited, particularly larger scale facilities.

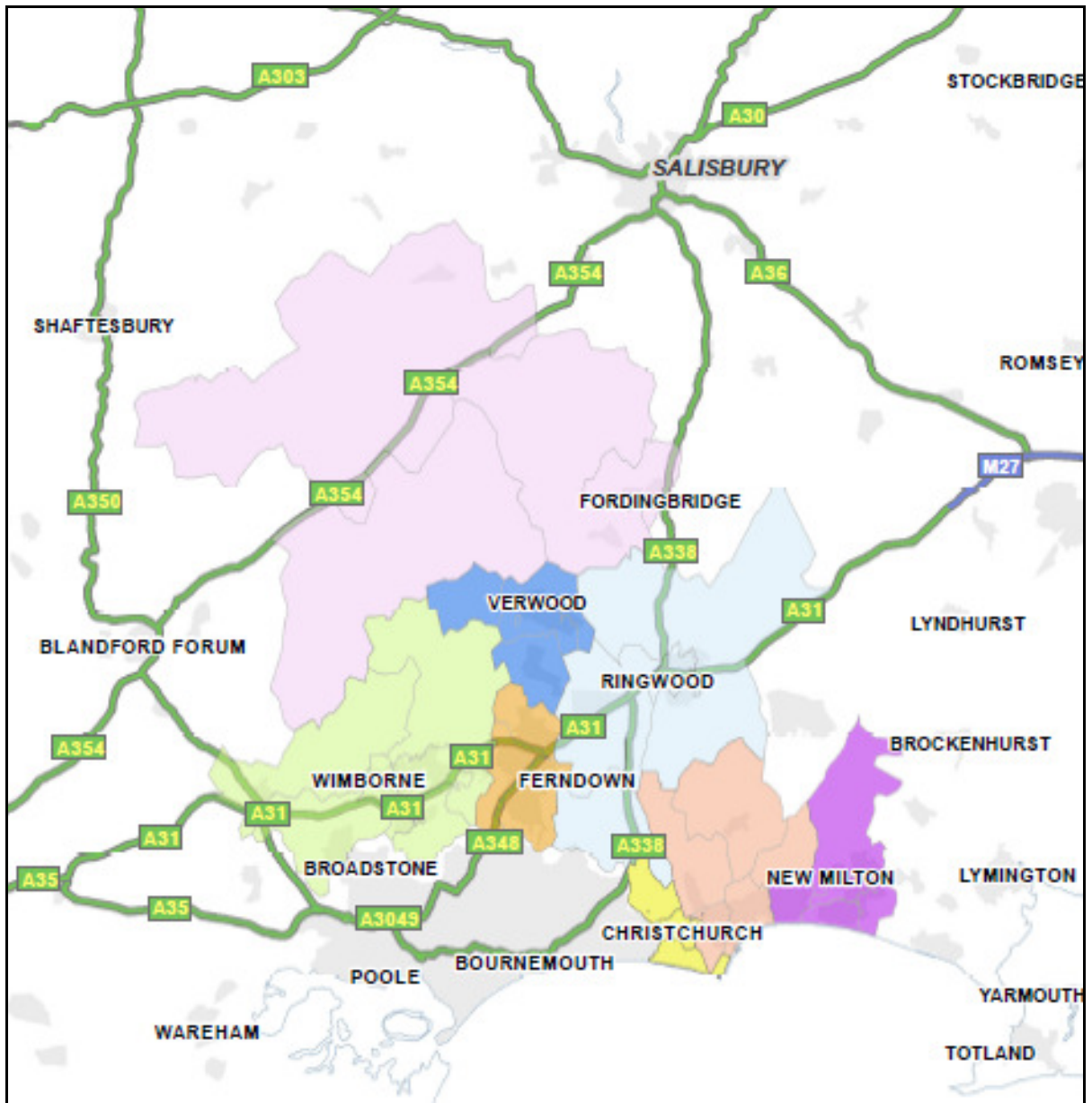
Accommodating Growth

- 5.17 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed.
- a What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
 - b Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of the authority area?
 - c Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
 - d If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?
- 5.18 Development should be appropriate in terms of scale and nature to the centre in which it is located. Based on the hierarchy of centres and the retail floorspace projections in this study report, retail developments over 1,000 sq m gross should generally be accommodated in Christchurch, Ferndown or Wimborne town centres.
- 5.19 The NPPF indicates that impact assessments should normally only be necessary for developments outside town centres of over 2,500 sq m gross. This threshold is considered inappropriate within Christchurch and East Dorset because this scale of development would represent a significant proportion of the overall retail floorspace projections in the authority area. Development smaller than 2,500 sq m gross could have a significant adverse impact, particularly on the smaller town centres. Based on the retail floorspace projections and the network of centres, a threshold of 1,000 sq m gross is recommended for retail development within Christchurch, Ferndown or Wimborne and a 500 sq m gross threshold for other parts of the authority area.









Non-Class A1 Uses

- 5.20 Policy KS7 of the emerging Core Strategy indicates that within the primary shopping cores, non-A1 uses should not cumulatively amount to more than 30% of ground floor units.
- 5.21 Based on the current proportions of non-A1 use within the designated centres and a comparison with Goad information for town centres across the country, the proposed 30% threshold for primary shopping frontages should provide some flexibility for changes of use and is not considered to be overly restrictive. No change to the proposed threshold is recommended.

Appendix A Study Area



Legend

-  Zone CH1
-  Zone CH2
-  Zone CH3
-  Zone ED1
-  Zone ED2
-  Zone ED3
-  Zone ED4
-  Zone ED5

Appendix B Convenience Assessment

Table 1: Population Projections

Zone	2010	2012	2018	2023	2028
<i>East Dorset</i>					
ED1 - Wimborne/Colehill	35,579	35,862	36,791	37,760	38,729
ED2 - Ferndown/West Moors	27,116	27,331	28,039	28,778	29,517
ED3 - Verwood	15,387	15,509	15,911	16,330	16,749
ED4 - Ringwood	22,043	22,218	22,794	23,394	23,995
ED5 - Alderholt/Fordingbridge	17,492	17,631	18,088	18,564	19,041
<i>Christchurch</i>					
CH1 - Christchurch/Burton	27,935	28,405	29,876	31,111	32,346
CH2 - Bournemouth East	20,719	21,068	22,158	23,074	23,990
CH3 - Barton/New Milton	15,616	15,809	16,389	16,890	17,373
Total	181,887	183,834	190,045	195,901	201,739

Sources:

*2010 Experian Population Estimates 2010**ONS 2010 Sub-national Population Projections*

Table 2: Convenience Retail Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2018	2023	2028
<i>East Dorset</i>				
ED1 - Wimborne/Colehill	£2,026	£2,062	£2,111	£2,155
ED2 - Ferndown/West Moors	£2,062	£2,099	£2,148	£2,194
ED3 - Verwood	£1,998	£2,033	£2,081	£2,125
ED4 - Ringwood	£2,131	£2,168	£2,219	£2,266
ED5 - Alderholt/Fordingbridge	£1,968	£2,003	£2,050	£2,093
<i>Christchurch</i>				
CH1 - Christchurch/Burton	£1,975	£2,010	£2,057	£2,101
CH2 - Bournemouth East	£1,983	£2,018	£2,065	£2,109
CH3 - Barton/New Milton	£1,944	£1,979	£2,025	£2,068

Sources:

Experian local estimates of 2010 convenience goods expenditure per capita

Excluding special forms of trading.

Experian Business Strategies (EBS) - forecast annual growth rates up to 2013.

EBS - Experian's forecast rates and the trend line projections adopted beyond 2013 (0.55% per annum).

Table 3: Total Convenience Retail Expenditure (2010 Prices)

Expenditure	2012	2018	2023	2028
<i>East Dorset</i>				
ED1 - Wimborne/Colehill	£72.66	£75.86	£79.71	£83.46
ED2 - Ferndown/West Moors	£56.36	£58.85	£61.82	£64.76
ED3 - Verwood	£30.99	£32.35	£33.98	£35.59
ED4 - Ashley Heath/St Leonards	£47.35	£49.42	£51.91	£54.37
ED5 - Alderholt/Fordingbridge	£34.70	£36.23	£38.06	£39.85
<i>Christchurch</i>				
CH1 - Christchurch/Burton	£56.10	£60.05	£63.99	£67.96
CH2 - Bournemouth East	£41.78	£44.72	£47.65	£50.60
CH3 - Barton/New Milton	£30.73	£32.43	£34.20	£35.93
Catchment Area Total	£370.66	£389.91	£411.32	£432.52

Sources:

Table 1 and Table 2

Table 4: Benchmark Convenience Goods Turnover 2012 (£ Millions - 2010 Prices)

Stores/Destinations	Net Sales Floorspace Sq M Net	% Convenience Sales Floorspace	Convenience Floorspace Sq M Net	Company Ave. Sales Density £ Per Sq M	Company Benchmark Turnover £M
Sainsbury's, Ferndown	4,227	65%	2,748	£12,599	£34.62
Tesco, Ferndown	3,189	60%	1,913	£12,432	£23.79
Lidl, Ferndown	846	80%	677	£3,030	£2.05
Iceland, Ferndown Town Centre	500	95%	475	£6,697	£3.18
Other Ferndown	850	85%	723	£4,000	£2.89
Ferndown Sub-Total	9,612		6,535		£66.53
Morrisons, Verwood	1,556	79%	1,223	£12,400	£15.17
Tesco Express, Verwood	134	95%	127	£12,432	£1.58
Verwood Other	370	95%	352	£4,000	£1.41
Verwood Sub-Total	2,060		1,702		£18.15
Waitrose, Wimborne	2,137	90%	1,923	£11,475	£22.07
Co-op, Crown Mead, Wimborne	1,310	85%	1,114	£7,279	£8.11
Co-op, Smugglers Lane, Wimborne	181	95%	172	£7,279	£1.25
Wimborne Other	765	100%	765	£4,000	£3.06
Wimborne Sub-Total	4,393		3,974		£34.49
Co-op, Station Road, West Moors	300	85%	255	£7,279	£1.86
Tesco Express, West Moors	144	90%	130	£12,432	£1.61
West Moors Other	200	100%	200	£4,000	£0.80
West Moors Sub-Total	644		585		£4.27
Co-op, New Road, West Parley	248	100%	248	£7,279	£1.81
Co-op, Wareham Road, Corfe Mullen	790	90%	711	£7,279	£5.18
Co-op, The Parade, Corfe Mullen	272	95%	258	£7,279	£1.88
Other Sub-Total	1,310		1,217		£8.86
East Dorset Total	18,019		14,013		£132.29
Waitrose, Christchurch	2,135	90%	1,922	£11,475	£22.05
Co-op, Christchurch	957	80%	766	£7,279	£5.57
Marks & Spencer, Christchurch	362	95%	344	£10,826	£3.72
Tesco Express, Barrack Rd, Christchurch	183	95%	174	£12,432	£2.16
Lidl Somerford Road	1,033	80%	826	£3,030	£2.50
Sainsbury's, Christchurch	4,464	76%	3,393	£12,599	£42.74
Other Christchurch Town Centre	700	90%	630	£4,000	£2.52
Christchurch Sub-Total	9,834		8,054		£81.27
Co-op, Highcliffe	411	85%	349	£7,279	£2.54
Tesco Express, Highcliffe	230	90%	207	£12,432	£2.57
Other Highcliffe	500	85%	425	£4,000	£1.70
Highcliff Sub-Total	1,141		556		£6.82
Christchurch Total	10,975		8,610		£88.09
JOINT AREA GRAND TOTAL	28,994		22,623	£9,742	£220.39

Source: IGD, Verdict Research and Morrison's planning application submission in Verwood

Table 5: Base Year Convenience Shopping Penetration Rates 2012

Store/Destination	East Dorset					Christchurch			Inflow
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3	
East Dorset									
Ferndown	19%	61%	21%	28%	9%	1%	0%	0%	10%
Verwood	1%	1%	53%	5%	9%	0%	0%	0%	10%
Wimborne	40%	5%	5%	0%	2%	0%	0%	0%	10%
West Moors	0%	6%	0%	1%	0%	0%	0%	0%	5%
Corfe Mullen	8%	0%	0%	0%	0%	0%	0%	0%	5%
West Parley	0%	6%	0%	0%	0%	0%	0%	0%	5%
East Dorset sub-total	68%	79%	79%	34%	20%	1%	0%	0%	<i>n/a</i>
Christchurch									
Christchurch	0%	0%	1%	2%	0%	62%	60%	25%	20%
Highcliffe	0%	0%	0%	0%	0%	2%	0%	6%	10%
Christchurch sub-total	0%	0%	1%	2%	0%	64%	60%	31%	<i>n/a</i>
JOINT AREA TOTAL	68%	79%	80%	36%	20%	65%	60%	31%	<i>n/a</i>
Other	32%	21%	20%	64%	80%	35%	40%	69%	<i>n/a</i>
GRAND TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	<i>n/a</i>

Source:

DJS Research household survey May 2010 and NEMS Household Survey July 2011 for Christchurch zones
NEMS household survey September 2007 for East Dorset zones with NLP adjustments

Table 6: Convenience Goods Shopping Patterns 2012

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2012 £M	£72.66	£56.36	£30.99	£47.35	£34.70	£56.10	£41.78	£30.73		
East Dorset										
Ferndown	£13.80	£34.38	£6.51	£13.26	£3.12	£0.56	£0.00	£0.00	£7.96	£79.59
Verwood	£0.73	£0.56	£16.42	£2.37	£3.12	£0.00	£0.00	£0.00	£2.58	£25.78
Wimborne	£29.06	£2.82	£1.55	£0.00	£0.69	£0.00	£0.00	£0.00	£3.79	£37.92
West Moors	£0.00	£3.38	£0.00	£0.47	£0.00	£0.00	£0.00	£0.00	£0.20	£4.06
Corfe Mullen	£5.81	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31	£6.12
West Parley	£0.00	£3.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£3.56
East Dorset Sub-Total	£49.41	£44.52	£24.48	£16.10	£6.94	£0.56	£0.00	£0.00	£15.02	£157.02
Christchurch										
Christchurch	£0.00	£0.00	£0.31	£0.95	£0.00	£34.78	£25.07	£7.68	£17.20	£85.99
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£1.12	£0.00	£1.84	£0.33	£3.30
Christchurch sub-total	£0.00	£0.00	£0.31	£0.95	£0.00	£35.90	£25.07	£9.53	£17.53	£89.28
JOINT AREA TOTAL	£49.41	£44.52	£24.79	£17.04	£6.94	£36.47	£25.07	£9.53	£32.54	£246.30
Other Outside Joint Area	£23.25	£11.84	£6.20	£30.30	£27.76	£19.64	£16.71	£21.21	n/a	£156.89
GRAND TOTAL	£72.66	£56.36	£30.99	£47.35	£34.70	£56.10	£41.78	£30.73		£403.20

Source:

Table 3 and Table 5

Table 7: Future Convenience Shopping Penetration Rates 2018 and Beyond

Store/Destination	East Dorset					Christchurch			Inflow
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3	
East Dorset									
Ferndown	19%	52%	11%	28%	8%	1%	0%	0%	10%
Verwood	2%	4%	68%	6%	12%	0%	0%	0%	10%
Wimborne	36%	5%	3%	0%	2%	0%	0%	0%	10%
West Moors	0%	6%	0%	1%	0%	0%	0%	0%	5%
Corfe Mullen	13%	0%	0%	0%	0%	0%	0%	0%	5%
West Parley	0%	15%	0%	0%	0%	0%	0%	0%	5%
East Dorset sub-total	70%	82%	82%	35%	22%	1%	0%	0%	<i>n/a</i>
Christchurch									
Christchurch	0%	0%	1%	2%	0%	62%	60%	25%	20%
Highcliffe	0%	0%	0%	0%	0%	2%	0%	6%	10%
Christchurch sub-total	0%	0%	1%	2%	0%	64%	60%	31%	<i>n/a</i>
JOINT AREA TOTAL	70%	82%	83%	37%	22%	65%	60%	31%	<i>n/a</i>
Other	30%	18%	17%	63%	78%	35%	40%	69%	<i>n/a</i>
GRAND TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	<i>n/a</i>

Source:

Table 5 with NLP adjustments for the extended Morrison's Store in Verwood and neighbourhood centres in Corfe Mullen and West Parley

Table 8: Convenience Goods Shopping Patterns 2018

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2018 £M	£75.86	£58.85	£32.35	£49.42	£36.23	£60.05	£44.72	£32.43		
East Dorset										
Ferndown	£14.41	£30.60	£3.56	£13.84	£2.90	£0.60	£0.00	£0.00	£7.32	£73.24
Verwood	£1.52	£2.35	£22.00	£2.96	£4.35	£0.00	£0.00	£0.00	£3.69	£36.87
Wimborne	£27.31	£2.94	£0.97	£0.00	£0.72	£0.00	£0.00	£0.00	£3.55	£35.50
West Moors	£0.00	£3.53	£0.00	£0.49	£0.00	£0.00	£0.00	£0.00	£0.21	£4.24
Corfe Mullen	£9.86	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£10.38
West Parley	£0.00	£8.83	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£9.29
East Dorset Sub-Total	£53.10	£48.26	£26.52	£17.30	£7.97	£0.60	£0.00	£0.00	£15.76	£169.51
Christchurch										
Christchurch	£0.00	£0.00	£0.32	£0.99	£0.00	£37.23	£26.83	£8.11	£18.37	£91.85
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£1.20	£0.00	£1.95	£0.35	£3.50
Christchurch sub-total	£0.00	£0.00	£0.32	£0.99	£0.00	£38.43	£26.83	£10.05	£18.72	£95.35
JOINT AREA TOTAL	£53.10	£48.26	£26.85	£18.28	£7.97	£39.03	£26.83	£10.05	£34.48	£264.86
Other Outside Joint Area	£22.76	£10.59	£5.50	£31.13	£28.26	£21.02	£17.89	£22.38	n/a	£159.53
GRAND TOTAL	£75.86	£58.85	£32.35	£49.42	£36.23	£60.05	£44.72	£32.43		£424.38

Source:

Table 3 and Table 7

Table 9: Convenience Goods Shopping Patterns 2023

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2023 £M	£79.71	£61.82	£33.98	£51.91	£38.06	£63.99	£47.65	£34.20		
East Dorset										
Ferndown	£15.15	£32.14	£3.74	£14.54	£3.04	£0.64	£0.00	£0.00	£7.69	£76.94
Verwood	£1.59	£2.47	£23.11	£3.11	£4.57	£0.00	£0.00	£0.00	£3.87	£38.73
Wimborne	£28.70	£3.09	£1.02	£0.00	£0.76	£0.00	£0.00	£0.00	£3.73	£37.30
West Moors	£0.00	£3.71	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£0.22	£4.45
Corfe Mullen	£10.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	£10.91
West Parley	£0.00	£9.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.49	£9.76
East Dorset Sub-Total	£55.80	£50.69	£27.87	£18.17	£8.37	£0.64	£0.00	£0.00	£16.55	£178.09
Christchurch										
Christchurch	£0.00	£0.00	£0.34	£1.04	£0.00	£39.68	£28.59	£8.55	£19.55	£97.74
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£1.28	£0.00	£2.05	£0.37	£3.70
Christchurch sub-total	£0.00	£0.00	£0.34	£1.04	£0.00	£40.96	£28.59	£10.60	£19.92	£101.45
JOINT AREA TOTAL	£55.80	£50.69	£28.21	£19.21	£8.37	£41.60	£28.59	£10.60	£36.47	£279.53
Other Outside Joint Area	£23.91	£11.13	£5.78	£32.70	£29.68	£22.40	£19.06	£23.60	n/a	£168.26
GRAND TOTAL	£79.71	£61.82	£33.98	£51.91	£38.06	£63.99	£47.65	£34.20		£447.79

Source:

Table 3 and Table 7

Table 10: Convenience Goods Shopping Patterns 2028

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2028 £M	£83.46	£64.76	£35.59	£54.37	£39.85	£67.96	£50.60	£35.93		
East Dorset										
Ferndown	£15.86	£33.68	£3.92	£15.22	£3.19	£0.68	£0.00	£0.00	£8.06	£80.60
Verwood	£1.67	£2.59	£24.20	£3.26	£4.78	£0.00	£0.00	£0.00	£4.06	£40.56
Wimborne	£30.05	£3.24	£1.07	£0.00	£0.80	£0.00	£0.00	£0.00	£3.91	£39.05
West Moors	£0.00	£3.89	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£0.23	£4.66
Corfe Mullen	£10.85	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£11.42
West Parley	£0.00	£9.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.51	£10.23
East Dorset Sub-Total	£58.42	£53.10	£29.19	£19.03	£8.77	£0.68	£0.00	£0.00	£17.34	£186.53
Christchurch										
Christchurch	£0.00	£0.00	£0.36	£1.09	£0.00	£42.13	£30.36	£8.98	£20.73	£103.65
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£1.36	£0.00	£2.16	£0.39	£3.91
Christchurch sub-total	£0.00	£0.00	£0.36	£1.09	£0.00	£43.49	£30.36	£11.14	£21.12	£107.55
JOINT AREA TOTAL	£58.42	£53.10	£29.54	£20.12	£8.77	£44.17	£30.36	£11.14	£38.46	£294.08
Other Outside Joint Area	£25.04	£11.66	£6.05	£34.25	£31.08	£23.79	£20.24	£24.79	n/a	£176.90
GRAND TOTAL	£83.46	£64.76	£35.59	£54.37	£39.85	£67.96	£50.60	£35.93		£470.97

Source:

Table 3 and Table 7

Table 11: Surplus Convenience Goods Expenditure Capacity (£Millions)

		2012	2018	2023	2028
AVAILABLE EXPENDITURE					
East Dorset	Ferndown	£79.59	£73.24	£76.94	£80.60
	Verwood	£25.78	£36.87	£38.73	£40.56
	Wimborne	£37.92	£35.50	£37.30	£39.05
	West Moors	£4.06	£4.24	£4.45	£4.66
	Corfe Mullen	£6.12	£10.38	£10.91	£11.42
	West Parley	£3.56	£9.29	£9.76	£10.23
	Sub-total	£157.02	£169.51	£178.09	£186.53
Christchurch	Christchurch	£85.99	£91.85	£97.74	£103.65
	Highcliffe	£3.30	£3.50	£3.70	£3.91
	Sub-total	£89.28	£95.35	£101.45	£107.55
JOINT AREA TOTAL		£246.30	£264.86	£279.53	£294.08
BENCHMARK TURNOVER EXISTING/PROPOSED FLOORSPACE					
East Dorset	Ferndown	£66.53	£66.53	£66.53	£66.53
	Verwood*	£18.15	£34.69	£34.69	£34.69
	Wimborne	£34.49	£34.49	£34.49	£34.49
	West Moors	£4.27	£4.27	£4.27	£4.27
	Corfe Mullen	£7.06	£7.06	£7.06	£7.06
	West Parley	£1.81	£1.81	£1.81	£1.81
	Sub-total	£132.29	£148.83	£148.83	£148.83
Christchurch	Christchurch	£81.27	£81.27	£81.27	£81.27
	Highcliffe	£6.82	£6.82	£6.82	£6.82
	Sub-total	£88.09	£88.09	£88.09	£88.09
JOINT AREA TOTAL		£220.39	£236.93	£236.93	£236.93
SURPLUS/DEFICIT EXPENDITURE					
East Dorset	Ferndown	£13.06	£6.71	£10.42	£14.07
	Verwood	£7.63	£2.17	£4.04	£5.87
	Wimborne	£3.43	£1.01	£2.81	£4.57
	West Moors	-£0.21	-£0.03	£0.18	£0.40
	Corfe Mullen	-£0.94	£3.32	£3.85	£4.36
	West Parley	£1.75	£7.49	£7.96	£8.42
	Sub-total	£24.73	£20.68	£29.25	£37.69
Christchurch	Christchurch	£4.71	£10.58	£16.47	£22.37
	Highcliffe	-£3.52	-£3.32	-£3.11	-£2.91
	Sub-total	£1.19	£7.26	£13.35	£19.46
JOINT AREA TOTAL		£25.92	£27.93	£42.61	£57.15

* extended Morrison's store in Verwood - additional 1,334 sq m net at £12,400 per sq m = £16.54 million

Table 11: Convenience Goods Floorspace Capacity

		2012	2018	2023	2028
SURPLUS EXPENDITURE					
East Dorset	Ferndown	£13.06	£6.71	£10.42	£14.07
	Verwood	£7.63	£2.17	£4.04	£5.87
	Wimborne	£3.43	£1.01	£2.81	£4.57
	West Moors	-£0.21	-£0.03	£0.18	£0.40
	Corfe Mullen	-£0.94	£3.32	£3.85	£4.36
	West Parley	£1.75	£7.49	£7.96	£8.42
	Sub-total	£24.73	£20.68	£29.25	£37.69
Christchurch	Christchurch	£4.71	£10.58	£16.47	£22.37
	Highcliffe	-£3.52	-£3.32	-£3.11	-£2.91
	Sub-total	£1.19	£7.26	£13.35	£19.46
JOINT AREA TOTAL		£25.92	£27.93	£42.61	£57.15
Sales Density - £ per Sq M Net		£9,742	£9,742	£9,742	£9,742
SALES FLOORSPACE SQ M NET					
East Dorset	Ferndown	1,341	689	1,069	1,445
	Verwood	783	223	414	603
	Wimborne	352	104	288	469
	West Moors	-22	-3	19	41
	Corfe Mullen	-96	341	395	448
	West Parley	180	769	817	864
	Sub-total	2,538	2,122	3,003	3,869
Christchurch	Christchurch	484	1,086	1,691	2,297
	Highcliffe	-361	-341	-320	-299
	Sub-total	122	745	1,371	1,998
JOINT AREA TOTAL		2,661	2,867	4,374	5,867

Appendix C Comparison Assessment

Table 1: Population Projections

Zone	2010	2012	2018	2023	2028
<i>East Dorset</i>					
ED1 - Wimborne/Colehill	35,579	35,862	36,791	37,760	38,729
ED2 - Ferndown/West Moors	27,116	27,331	28,039	28,778	29,517
ED3 - Verwood	15,387	15,509	15,911	16,330	16,749
ED4 - Ringwood	22,043	22,218	22,794	23,394	23,995
ED5 - Alderholt/Fordingbridge	17,492	17,631	18,088	18,564	19,041
<i>Christchurch</i>					
CH1 - Christchurch/Burton	27,935	28,405	29,876	31,111	32,346
CH2 - Bournemouth East	20,719	21,068	22,158	23,074	23,990
CH3 - Barton/New Milton	15,616	15,809	16,389	16,890	17,373
Total	181,887	183,834	190,045	195,901	201,739

Sources:

2010 Experian Population Estimates 2010

ONS 2010 Sub-national Population Projections

Table 2: Comparison Goods Retail Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2018	2023	2028
<i>East Dorset</i>				
ED1 - Wimborne/Colehill	£3,175	£3,678	£4,264	£4,943
ED2 - Ferndown/West Moors	£2,990	£3,463	£4,015	£4,654
ED3 - Verwood	£3,158	£3,658	£4,241	£4,916
ED4 - Ringwood	£3,229	£3,740	£4,336	£5,027
ED5 - Alderholt/Fordingbridge	£3,048	£3,530	£4,093	£4,745
<i>Christchurch</i>				
CH1 - Christchurch/Burton	£2,802	£3,246	£3,763	£4,362
CH2 - Bournemouth East	£2,912	£3,373	£3,911	£4,534
CH3 - Barton/New Milton	£2,603	£3,015	£3,495	£4,052

Sources:

Experian local estimates of 2010 comparison goods expenditure per capita

Excluding special forms of trading.

Experian Business Strategies (EBS) - forecast annual growth rates

Table 3: Total Comparison Retail Expenditure (2010 Prices)

Expenditure	2012	2018	2023	2028
<i>East Dorset</i>				
ED1 - Wimborne/Colehill	£113.86	£135.32	£161.01	£191.44
ED2 - Ferndown/West Moors	£81.72	£97.10	£115.54	£137.37
ED3 - Verwood	£48.98	£58.20	£69.26	£82.34
ED4 - Ashley Heath/St Leonards	£71.74	£85.25	£101.44	£120.62
ED5 - Alderholt/Fordingbridge	£53.74	£63.85	£75.98	£90.35
<i>Christchurch</i>				
CH1 - Christchurch/Burton	£79.59	£96.98	£117.07	£141.09
CH2 - Bournemouth East	£61.35	£74.74	£90.24	£108.77
CH3 - Barton/New Milton	£41.15	£49.41	£59.03	£70.39
Catchment Area Total	£552.14	£660.85	£789.57	£942.38

Sources:

Table 1 and Table 2

Table 4: Comparison Goods Floorspace 2012

Stores/Destinations	Gross Floorspace Sq M	Sales Floorspace Sq M Net
Ferndown	5,680	3,976
Comparison in Food Stores	n/a	3,077
Verwood	866	563
Comparison in Food Stores	n/a	358
Wimborne	11,440	8,008
Comparison in Food Stores	n/a	419
West Moors	1,184	770
Comparison in Food Stores	n/a	59
Other East Dorset	n/a	743
East Dorset Total	n/a	17,973
Christchurch	11,470	8,029
Comparison in Food Stores	n/a	79
Meteor Retail Park (occupied only)	3,544	3,012
Christchurch Retail Park	9,441	8,025
Stony Lane Retail Warehouses	6,098	5,183
Local Shops Christchurch	n/a	1,912
Other Highcliffe	4,340	2,821
Christchurch Total	n/a	29,062
JOINT AREA GRAND TOTAL	n/a	47,034

Source: Goad Plans November 2011, VOA

Table 5: Estimated Comparison Shopping Penetration Rates 2012

Store/Destination	East Dorset					Christchurch			Inflow
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3	
East Dorset									
Ferndown	2%	16%	6%	3%	1%	0%	0%	0%	15%
Verwood	0%	0%	8%	0%	1%	0%	0%	0%	5%
Wimborne	25%	3%	4%	0%	2%	0%	0%	0%	15%
West Moors	0%	2%	2%	0%	0%	0%	0%	0%	15%
East Dorset Other	2%	1%	0%	0%	0%	0%	0%	0%	2%
East Dorset sub-total	29%	22%	20%	3%	4%	0%	0%	0%	n/a
Christchurch									
Christchurch	0%	0%	1%	1%	0%	25%	25%	10%	20%
Christchurch Retail Warehouses	2%	1%	0%	1%	1%	18%	18%	18%	25%
Highcliffe	0%	0%	0%	0%	0%	5%	1%	3%	15%
Christchurch sub-total	2%	1%	1%	2%	1%	48%	44%	31%	n/a
JOINT AREA TOTAL	31%	23%	21%	5%	5%	48%	44%	31%	n/a
Other	69%	77%	79%	95%	95%	52%	56%	69%	n/a
GRAND TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: NEMS Household Survey July 2011 for Christchurch zones
NEMS household survey September 2007 for East Dorset with NLP adjustments

Table 6: Comparison Goods Shopping Patterns 2012

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
<i>Expenditure 2012 £M</i>	£113.86	£81.72	£48.98	£71.74	£53.74	£79.59	£61.35	£41.15		
East Dorset										
Ferndown	£2.28	£13.08	£2.94	£2.15	£0.54	£0.00	£0.00	£0.00	£3.70	£24.68
Verwood	£0.00	£0.00	£3.92	£0.00	£0.54	£0.00	£0.00	£0.00	£0.23	£4.69
Wimborne	£28.47	£2.45	£1.96	£0.00	£1.07	£0.00	£0.00	£0.00	£5.99	£39.94
West Moors	£0.00	£1.63	£0.98	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£3.08
East Dorset Other	£2.28	£0.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.16
East Dorset Sub-Total	£33.02	£17.98	£9.80	£2.15	£2.15	£0.00	£0.00	£0.00	£10.45	£75.55
Christchurch										
Christchurch	£0.00	£0.00	£0.49	£0.72	£0.00	£19.90	£15.34	£4.12	£10.14	£50.70
Christchurch Retail Warehouses	£2.28	£0.82	£0.00	£0.72	£0.54	£14.33	£11.04	£7.41	£12.38	£49.50
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£3.98	£0.61	£1.23	£1.03	£6.86
Christchurch sub-total	£2.28	£0.82	£0.49	£1.43	£0.54	£38.20	£26.99	£12.76	£23.54	£107.05
JOINT AREA TOTAL	£35.30	£18.80	£10.29	£3.59	£2.69	£38.20	£26.99	£12.76	£34.00	£182.60
Other Outside Joint Area	£78.56	£62.93	£38.69	£68.16	£51.05	£41.39	£34.36	£28.39	n/a	£403.53
GRAND TOTAL	£113.86	£81.72	£48.98	£71.74	£53.74	£79.59	£61.35	£41.15		£586.13

Source: Table 3 and Table 5

Table 7: Future Comparison Shopping Penetration Rates 2018 and beyond

Store/Destination	East Dorset					Christchurch			Inflow
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3	
East Dorset									
Ferndown	2%	16%	6%	3%	1%	0%	0%	0%	15%
Verwood	0%	0%	10%	0%	2%	0%	0%	0%	5%
Wimborne	25%	3%	4%	0%	2%	0%	0%	0%	15%
West Moors	0%	2%	2%	0%	0%	0%	0%	0%	15%
East Dorset Other	2%	1%	0%	0%	0%	0%	0%	0%	2%
East Dorset sub-total	29%	22%	22%	3%	5%	0%	0%	0%	n/a
Christchurch									
Christchurch	0%	0%	1%	1%	0%	25%	25%	10%	20%
Christchurch Retail Warehouses	2%	1%	0%	1%	1%	18%	18%	18%	25%
Highcliffe	0%	0%	0%	0%	0%	5%	1%	3%	15%
Christchurch sub-total	2%	1%	1%	2%	1%	48%	44%	31%	n/a
JOINT AREA TOTAL	31%	23%	23%	5%	6%	48%	44%	31%	n/a
Other	69%	77%	77%	95%	94%	52%	56%	69%	n/a
GRAND TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	n/a

Source: Table 5 with NLP adjustments for Morrison extension in Verwood

Table 8: Comparison Goods Shopping Patterns 2018

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
<i>Expenditure 2018 £M</i>	£135.32	£97.10	£58.20	£85.25	£63.85	£96.98	£74.74	£49.41		
East Dorset										
Ferndown	£2.71	£15.54	£3.49	£2.56	£0.64	£0.00	£0.00	£0.00	£4.40	£29.33
Verwood	£0.00	£0.00	£5.82	£0.00	£1.28	£0.00	£0.00	£0.00	£0.37	£7.47
Wimborne	£33.83	£2.91	£2.33	£0.00	£1.28	£0.00	£0.00	£0.00	£7.12	£47.47
West Moors	£0.00	£1.94	£1.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	£3.65
East Dorset Other	£2.71	£0.97	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.75
East Dorset Sub-Total	£39.24	£21.36	£12.80	£2.56	£3.19	£0.00	£0.00	£0.00	£12.52	£91.67
Christchurch										
Christchurch	£0.00	£0.00	£0.58	£0.85	£0.00	£24.24	£18.69	£4.94	£12.33	£61.63
Christchurch Retail Warehouses	£2.71	£0.97	£0.00	£0.85	£0.64	£17.46	£13.45	£8.89	£14.99	£59.96
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£4.85	£0.75	£1.48	£1.25	£8.33
Christchurch sub-total	£2.71	£0.97	£0.58	£1.70	£0.64	£46.55	£32.89	£15.32	£28.57	£129.92
JOINT AREA TOTAL	£41.95	£22.33	£13.39	£4.26	£3.83	£46.55	£32.89	£15.32	£41.08	£221.60
Other Outside Joint Area	£93.37	£74.77	£44.82	£80.99	£60.02	£50.43	£41.85	£34.09	n/a	£480.33
GRAND TOTAL	£135.32	£97.10	£58.20	£85.25	£63.85	£96.98	£74.74	£49.41		£701.93

Source: Table 3 and Table 7

Table 9: Comparison Goods Shopping Patterns 2023

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2023 £M	£161.01	£115.54	£69.26	£101.44	£75.98	£117.07	£90.24	£59.03		
East Dorset										
Ferndown	£3.22	£18.49	£4.16	£3.04	£0.76	£0.00	£0.00	£0.00	£5.24	£34.90
Verwood	£0.00	£0.00	£6.93	£0.00	£1.52	£0.00	£0.00	£0.00	£0.44	£8.89
Wimborne	£40.25	£3.47	£2.77	£0.00	£1.52	£0.00	£0.00	£0.00	£8.47	£56.48
West Moors	£0.00	£2.31	£1.39	£0.00	£0.00	£0.00	£0.00	£0.00	£0.65	£4.35
East Dorset Other	£3.22	£1.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£4.46
East Dorset Sub-Total	£46.69	£25.42	£15.24	£3.04	£3.80	£0.00	£0.00	£0.00	£14.89	£109.08
Christchurch										
Christchurch	£0.00	£0.00	£0.69	£1.01	£0.00	£29.27	£22.56	£5.90	£14.86	£74.30
Christchurch Retail Warehouses	£3.22	£1.16	£0.00	£1.01	£0.76	£21.07	£16.24	£10.63	£18.03	£72.12
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£5.85	£0.90	£1.77	£1.50	£10.03
Christchurch sub-total	£3.22	£1.16	£0.69	£2.03	£0.76	£56.19	£39.71	£18.30	£34.39	£156.45
JOINT AREA TOTAL	£49.91	£26.58	£15.93	£5.07	£4.56	£56.19	£39.71	£18.30	£49.29	£265.53
Other Outside Joint Area	£111.10	£88.97	£53.33	£96.36	£71.42	£60.88	£50.54	£40.73	n/a	£573.32
GRAND TOTAL	£161.01	£115.54	£69.26	£101.44	£75.98	£117.07	£90.24	£59.03		£838.86

Source: Table 3 and Table 7

Table 10: Comparison Goods Shopping Patterns 2028

	East Dorset					Christchurch			Inflow	Total
	ED1	ED2	ED3	ED4	ED5	CH1	CH2	CH3		
Expenditure 2028 £M	£191.44	£137.37	£82.34	£120.62	£90.35	£141.09	£108.77	£70.39		
East Dorset										
Ferndown	£3.83	£21.98	£4.94	£3.62	£0.90	£0.00	£0.00	£0.00	£6.22	£41.49
Verwood	£0.00	£0.00	£8.23	£0.00	£1.81	£0.00	£0.00	£0.00	£0.53	£10.57
Wimborne	£47.86	£4.12	£3.29	£0.00	£1.81	£0.00	£0.00	£0.00	£10.07	£67.15
West Moors	£0.00	£2.75	£1.65	£0.00	£0.00	£0.00	£0.00	£0.00	£0.78	£5.17
East Dorset Other	£3.83	£1.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£5.31
East Dorset Sub-Total	£55.52	£30.22	£18.11	£3.62	£4.52	£0.00	£0.00	£0.00	£17.71	£129.70
Christchurch										
Christchurch	£0.00	£0.00	£0.82	£1.21	£0.00	£35.27	£27.19	£7.04	£17.88	£89.42
Christchurch Retail Warehouses	£3.83	£1.37	£0.00	£1.21	£0.90	£25.40	£19.58	£12.67	£21.65	£86.61
Highcliffe	£0.00	£0.00	£0.00	£0.00	£0.00	£7.05	£1.09	£2.11	£1.81	£12.06
Christchurch sub-total	£3.83	£1.37	£0.82	£2.41	£0.90	£67.72	£47.86	£21.82	£41.35	£188.09
JOINT AREA TOTAL	£59.35	£31.60	£18.94	£6.03	£5.42	£67.72	£47.86	£21.82	£59.05	£317.79
Other Outside Joint Area	£132.09	£105.78	£63.40	£114.59	£84.93	£73.37	£60.91	£48.57	n/a	£683.64
GRAND TOTAL	£191.44	£137.37	£82.34	£120.62	£90.35	£141.09	£108.77	£70.39		£1,001.43

Source: Table 3 and Table 7

Table 11: Surplus Comparison Goods Expenditure Capacity (£Millions)

		2012	2018	2023	2028
AVAILABLE EXPENDITURE					
<i>East Dorset</i>	Ferndown	£24.68	£29.33	£34.90	£41.49
	Verwood	£4.69	£7.47	£8.89	£10.57
	Wimborne	£39.94	£47.47	£56.48	£67.15
	West Moors	£3.08	£3.65	£4.35	£5.17
	East Dorset Other	£3.16	£3.75	£4.46	£5.31
	Sub-total	£75.55	£91.67	£109.08	£129.70
<i>Christchurch</i>	Christchurch	£50.70	£61.63	£74.30	£89.42
	Christchurch retail warehouses	£49.50	£59.96	£72.12	£86.61
	Highcliffe	£6.86	£8.33	£10.03	£12.06
	Sub-total	£107.05	£129.92	£156.45	£188.09
JOINT AREA TOTAL		£182.60	£221.60	£265.53	£317.79
BENCHMARK TURNOVER EXISTING FLOORSPACE					
<i>East Dorset</i>	Ferndown	£24.68	£27.31	£29.71	£32.33
	Verwood	£4.69	£5.19	£5.65	£6.14
	Wimborne	£39.94	£44.19	£48.08	£52.31
	West Moors	£3.08	£3.40	£3.70	£4.03
	East Dorset Other	£3.16	£3.49	£3.80	£4.14
	Sub-total	£75.55	£83.59	£90.94	£98.94
<i>Christchurch</i>	Christchurch	£50.70	£56.09	£61.03	£66.39
	Christchurch retail warehouses	£49.50	£54.77	£59.59	£64.83
	Highcliffe	£6.86	£7.59	£8.25	£8.98
	Sub-total	£107.05	£118.45	£128.87	£140.20
JOINT AREA TOTAL		£182.60	£202.04	£219.81	£239.14
SURPLUS/DEFICIT EXPENDITURE					
<i>East Dorset</i>	Ferndown	n/a	£2.02	£5.19	£9.17
	Verwood	n/a	£2.28	£3.24	£4.43
	Wimborne	n/a	£3.27	£8.40	£14.85
	West Moors	n/a	£0.25	£0.65	£1.14
	East Dorset Other	n/a	£0.26	£0.66	£1.17
	Sub-total		£8.08	£18.14	£30.76
<i>Christchurch</i>	Christchurch	n/a	£5.54	£13.27	£23.03
	Christchurch retail warehouses	n/a	£5.19	£12.54	£21.79
	Highcliffe	n/a	£0.74	£1.78	£3.09
	Sub-total		£11.47	£27.59	£47.90
JOINT AREA TOTAL			£19.56	£45.73	£78.66

Table 12: Comparison Goods Floorspace Capacity

		2018	2023	2028
SURPLUS EXPENDITURE				
East Dorset	Ferndown	£2.02	£5.19	£9.17
	Verwood	£2.28	£3.24	£4.43
	Wimborne	£3.27	£8.40	£14.85
	West Moors	£0.25	£0.65	£1.14
	East Dorset Other	£0.26	£0.66	£1.17
	Sub-total	£8.08	£18.14	£30.76
Christchurch	Christchurch	£5.54	£13.27	£23.03
	Christchurch retail warehouses	£5.19	£12.54	£21.79
	Highcliffe	£0.74	£1.78	£3.09
	Sub-total	£11.47	£27.59	£47.90
JOINT AREA TOTAL		£19.56	£45.73	£78.66
Sales Density - £ per Sq M Net		£5,000	£5,440	£5,918
SALES FLOORSPACE SQ M NET				
East Dorset	Ferndown	404	954	1,549
	Verwood	456	596	748
	Wimborne	655	1,544	2,509
	West Moors	50	119	193
	East Dorset Other	52	122	198
	Sub-total	1,617	3,335	5,197
Christchurch	Christchurch	1,108	2,440	3,891
	Christchurch retail warehouses	1,038	2,304	3,681
	Highcliffe	148	327	521
	Sub-total	2,294	5,071	8,093
JOINT AREA TOTAL		3,911	8,407	13,291



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