Bournemouth, Christchurch and East Dorset Joint Retail and Leisure Study

Update Addendum Report

22 March 2019

LICHFIELDS

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Contents

Appendices

1.0 Introduction

1.1 Lichfields was been commissioned by Bournemouth Borough Council and Christchurch and East Dorset Councils to prepare a Joint Retail and Leisure Study (JRLS 2017). The JRLS 2017 was split into two volumes. Volume 1 provided need assessments for retail and other main town centre uses. Volume 2 examined how projected growth could be accommodated and provided policy recommendations. The JRLS 2017 included an assessment of:

1. changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession, the availability of 2011 Census data, the requirements of the NPPF and the recent changes to permitted development rights;
2. the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2033;
3. the potential implications of emerging developments both within and Bournemouth, Christchurch and East Dorset, in terms of impact on town centres and potential changes to shopping patterns;
4. the existing retail hierarchy and network of centres and advises whether any changes are required; and
5. development plan policies, allocations and recommendations on how each centre can develop its role.

1.2 This addendum report provides a partial update of the JRLS, and should be read alongside Volume 1 and 2 of the JRLS 2017. This update report replaces the following sections of the JRLS.

JRLS Volume 1

- Section 1 - Policy Context, National Policy (paragraphs 2.1 to 2.13);
- Section 4 - Future Requirements for Retail Uses (paragraphs 4.1 to 4.70);
- Section 6 - Conclusions (paragraphs 6.1 to 6.11);
- Appendix 2 - Convenience assessment;
- Appendix 3 – Comparison assessment;
- Appendix 4 - Food/beverage assessment;

JRLS Volume 2

- Section 4 - Accommodating growth.

1.3 This report updates the retail and food/beverage floorspace capacity projections 2017 to 2033, including:

1. the implications of the revised National Planning Policy Framework (NPPF – July 2018);
2. an update of population projections based on the Office of National Statistic's latest 2016 base sub-national projections (SNPP);
3. adoption of Experian's local expenditure data (the latest 2017 base year data has been obtained for the 12 study area zones);
4. adoption of Experian's latest (December 2018) expenditure growth and home shopping forecasts (special forms of trading - SFT);

5 revised retail sales floorspace for main food stores, based on the latest StorePoint 2018 database;

6 benchmark turnover estimates for existing and proposed food store floorspace based on Global Data 2018 information;

7 Experian's latest growth forecasts for sale density/turnover efficiencies;

8 an update of planned commitments; and

9 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met.

1.4 Experian's latest expenditure projections and deductions for home shopping were published in December 2018, and therefore take account Experian's recent views on general retail market conditions.

2.0 National planning policy

2.1 The JRLS was prepared in 2017 and was based on the guidance set out in the NPPF (published by the Department for Communities and Local Government on 27 March 2012). The revised NPPF (July 2018) consolidates a series of proposals that have been made in the last two and half years, and which have been included in various consultation documents. The policies in the revised NPPF are material considerations when determining planning applications 'from the day of its publication' (i.e. from 24 July 2018).

2.2 In relation to town centres, the revised 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. The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the final version of the revised 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'.

2.3 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 should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites.

2.4 In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

2.5 A key change (para. 86 – change underlined) is *"main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered"*. The reason for this change is to avoid prejudicing more central sites that are in the pipeline but not available straight away. The definition of a "reasonable period" is still open to debate, but logically this period should relate to the likely timetable for delivery of the application proposal.

2.6 The NPPF's presumption in favour of sustainable development (para. 11) remains. For plan-making this means that:

- a plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change;
- b 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, unless:
  - i the application of policies in this Framework that protect areas or assets of importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area; or
  - ii any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the other policies in the Framework.

2.7 The development plan must include strategic policies to address each local planning authority's priorities for the development and use of land in its area. These strategic policies can be produced in different ways, depending on the issues and opportunities facing each area (para. 17). Policies to address non-strategic matters should be included in local plans that contain both strategic and non-strategic policies, and/or in local or neighbourhood plans that contain just non-strategic policies (para. 18).

2.8 Strategic policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for (para. 20):

- a housing (including affordable housing), employment, retail, leisure and other commercial development;
- b infrastructure for transport, telecommunications, security, waste management, water supply, wastewater, flood risk and coastal change management, and the provision of minerals and energy (including heat);
- c community facilities (such as health, education and cultural infrastructure); and
- d conservation and enhancement of the natural, built and historic environment, including landscapes and green infrastructure, and planning measures to address climate change mitigation and adaptation.

2.9 Strategic policies should provide a clear strategy for bringing sufficient land forward, and at a sufficient rate, to address objectively assessed needs over the plan period, in line with the presumption in favour of sustainable development. This should include planning for and allocating sufficient sites to deliver the strategic priorities of the area (except insofar as these needs can be demonstrated to be met more appropriately through other mechanisms, such as brownfield registers or non-strategic policies) (para. 21).

2.10 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 (para. 31).

2.11 Planning policies should:

- a set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;
- b set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- c seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
- d be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.

2.12 In terms of retail, planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should (para. 85):

- a 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;
- b 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;

c retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d 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;

e 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

f recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.13 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.

2.14 The sequential approach test indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 87).

2.15 The NPPF (para. 88) confirms this sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

2.16 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure 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. 89). This should include an assessment of:

a 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

b the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

2.17 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. 90).

2.18 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the primary shopping area. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

2.19 The revised NPPF does not refer to primary and secondary frontages, which previously made up the primary shopping area. The aim of the new NPPF appears to create more flexibility and encourage positive strategies for town centres. However, the primary shopping area is still the defined area where retail development is concentrated.

General Permitted Development Order

2.20 Recent changes to the General Permitted Development Order (GPDO) have also had an impact on some town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures can change the composition of town centres, including the amount of Class A1 space is likely to reduce in some centres. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages where there are concentrations of smaller units, but conversely it could have an impact on the ability of operators to find space in areas where demand is higher.

2.21 James Brokenshire's recent written ministerial statement (March 2019) confirmed the reforms to the GPDO. This statement seeks to support the high street by introducing "additional flexibilities" for business, including:

- clarification on the ability of Class A uses to diversify and incorporate ancillary uses without undermining the amenity of the area;
- introduction of a new permitted development right to allow shops (A1), financial and professional services (A2), hot food takeaways (A5), betting shops, pay day loan shop and launderettes to change use to office use (B1); and
- to allow hot food takeaways (A5) to change to residential use (C3).

2.22 Temporary change of uses to a building will be extended from two to three years so that more community uses can take advantage of the temporary rights. The statement also includes permitted development right for upwards extensions on buildings, where the existing streetscape is respected. These changes will have implications for town centres and the ability to control the mix of uses.

3.0 Future floorspace requirements

Introduction

3.1 This section re-assesses the need for Class A1 retail and Class A3- A5 food/beverage uses within Bournemouth, Christchurch and East Dorset up to 2033.

3.2 As indicated in Section 2, long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Long term projections must be treated with caution and kept under review. The revised NPPF 2018 suggests the need for new town centre uses should be accommodated over a ten-year period. For these reasons this section provides projections from 2017 to 2023, and then to 2028, with horizon projections up to 2033 that will need to be monitored and kept under review.

3.3 Appendix 1 to this report 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. A qualitative assessment of the range and scale of existing shopping facilities was undertaken as part of the JRLS Volume 2.

Study area

3.4 The Study Area covers the primary catchment areas of the town centres in Bournemouth, Christchurch and East Dorset. The primary catchment area is the hinterland where each town/ shopping destinations attracts most of its trade. The study area has been sub-divided into 12 zones as shown in Appendix 1, based on postcode boundaries, reflecting the primary catchment areas of the main destinations within Bournemouth, Christchurch and East Dorset. i.e. Bournemouth Town Centre, Christchurch Town Centre, Highcliffe, Ferndown, Verwood, Wimborne as well as those beyond i.e. Poole and Ringwood.

Population

3.5 The revised projected population within the study area between 2017 to 2033 is set out in Table 1 in Appendix 2. Base year 2017 population data has been obtained from Experian for each zone. The 2017 base year population for each zone has been projected forward up to 2033 based on the Office of National Statistic's latest 2016 based sub-national population projections (published October 2017). The base year 2017 population within the study area is 673,596, marginally higher than the projection in the JRLS 2017 (672,392). This base year population is projected to increase to 709,691 by 2028, and to 723,320 by 2033, an overall increase of 7.4%.

3.6 The JRLS 2017 floorspace capacity projections were based on a higher population growth of 17% between 2017 and 2033.

3.7 As in the JRLS 2017, tourist visitor expenditure has been included. Tourist visitor numbers are estimated to add on average 43,000 people to the resident population each day.

Expenditure

3.8 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 local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2017 have been obtained.

3.9 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 16 – December 2018) has been used to forecast expenditure within the study area, as described in Appendix 1.

3.10 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2033. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3. Forecasts of food and beverage spending per capita are shown in Table 2 in Appendix 4.

3.11 Excluding SFT expenditure per capita between 2017 and 2033 is projected to increase as follows (previous JRLS projections in brackets):

- convenience goods - 0.1% (- 1.8%);
- comparison goods + 55.6% (+ 55.6%);
- food/beverage + 20.9% (+ 24.7%)

3.12 The growth projections are broadly similar. The revised figures show a smaller decline in convenience goods expenditure and lower growth for food/beverage expenditure. The comparison goods growth projection remains unchanged.

3.13 Table 3 in Appendix 2 sets out total convenience goods within the study area up to 2033 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3 in Appendix 3. Forecasts of food and beverage spending are shown in Table 3 in Appendix 4.

3.14 As in the JRLS 2017, the annual tourist expenditure for the 43,000 visitors per day is £42.40 million for convenience goods, £98.9 million for comparison goods and £227.56 million for food and beverage.

3.15 Taking account both growth in population and expenditure per person, total convenience goods spending within the study area is forecast to increase by 7% from £1,552.92 million in 2017 to £1,661.63 million in 2033, as shown in Table 3 (Appendix 2). This projected growth is lower than previously forecast (14%) in the JRLS 2017, due to lower population growth.

3.16 Total comparison goods spending is forecast to increase by 66% between 2017 and 2033, increasing from £2,244.71 million in 2017 to £3,734.48 million in 2033, as shown in Table 3 (Appendix 3). This projected growth is lower than previously forecast (73%) in the JRLS 2017, again due to lower population growth.

3.17 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.18 Food/beverage spending is forecast to increase by 28% between 2017 and 2033, increasing from £1,048.53 million in 2017 to £1,340.94 million in 2033, as shown in Table 3 (Appendix 3). This projected growth is lower than previously forecast (36%) in the JRLS 2017, again due to lower population growth.

3.19 Experian's food and beverage expenditure per capita projections are shown in Table 2 in Appendix 4. The total food and beverage expenditure in the study area is £784.3 million in 2017, see Table 3 in Appendix 4. Including tourism expenditure, this increases to £1,011.86 million in 2017.

Market shares/Penetration rates

3.20 To assess the capacity for new retail and food/beverage floorspace, the penetration rates estimated for facilities within the study area from the JRLS have been adopted.

3.21 The results of the household shopper survey relating to main and top-up food and grocery shopping were used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top-up shopping.

3.22 The market shares for comparison goods shopping are shown in Table 4 in Appendix 3, and food and beverage (Class A3 to A5) are shown in Table 4 in Appendix 4.

Benchmark turnover

3.23 The total benchmark turnover of identified convenience sales floorspace within the main centres in Bournemouth Borough is £471.23 million (Table 9, Appendix 2). The previous figure in the JRLS 2017 was £447.3 million (at 2015 prices). The benchmark has increased (+£23.93 million) primarily due to the 2017 price base and the new Aldi food store at Mallard Retail Park (benchmark turnover of £9.28 million).

3.24 The total benchmark turnover of identified convenience sales floorspace within Christchurch Borough is £131.11 million (Table 10, Appendix 2) and the benchmark turnover of facilities in East Dorset is £193.32 million, compared with previous estimates of £127.02 million and £172.64 million respectively (2015 prices). The increase in East Dorset (+£20.68 million) is primarily due to above inflation growth in company average sales densities for Tesco and Co-op, who dominate food store provision in East Dorset.

Base year spending patterns - 2017

Convenience goods

3.25 The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. The level of convenience goods expenditure attracted to shops/stores in the three authorities in 2017 is estimated to be (see Table 5 in Appendix 2):

- Bournemouth Borough £420.44 million;
- Christchurch Borough £148.00 million; and
- East Dorset District £192.55 million.

3.26 These figures are marginally higher than those estimated in the JRLS 2017, due to the change in price base from 2015 to 2017.

3.27 The total benchmark turnover of existing convenience sales floorspace within the Bournemouth Borough is £471.23 million (Table 9, Appendix 2), compared with the actual turnover of £420.44 million in 2017. The base year figures suggest that convenience goods retail sales floorspace in Bournemouth is collectively trading 10.8% below the national average, with an expenditure deficit of -£50.8 million in 2017, the difference between the actual spending at retail facilities in the District and the benchmark turnover i.e. is existing floorspace trading above average (suggesting an expenditure surplus) or trading below average (suggesting an expenditure deficit). The comparable figures in the JRLS 2017 were 8.4% below the national average and an expenditure deficit of -£37.4 million in 2017. The new Aldi store at Mallard Retail Park has increase the expenditure deficit, because the increased total benchmark turnover (with Aldi included) will exceed available expenditure to a greater extent.

3.28 The total benchmark turnover of existing convenience sales floorspace within Christchurch Borough is £131.11 million (Table 10, Appendix 2), compared with the actual turnover of £148 million in 2017. The base year figures suggest that convenience goods retail floorspace in

Christchurch is collectively trading 12.9% above the national average, with an expenditure surplus of +£16.89 million in 2017.

3.29 The total benchmark turnover of identified existing convenience sales floorspace within the East Dorset District is £193.32 million (Table 10, Appendix 2), compared with the actual turnover of £192.55 million in 2017. The base year figures suggest that convenience goods retail sales floorspace in East Dorset is collectively trading around the national average, with a small expenditure deficit surplus of -£0.77 million in 2017.

Comparison goods

3.30 The level of comparison goods expenditure attracted to shops/stores in the three authorities in 2017 is estimated to be (see Table 5 in Appendix 3):

- Bournemouth Borough £867.81 million;
- Christchurch Borough £172.66 million; and
- East Dorset District £123.32 million.

3.31 These figures are similar to those estimated in the JRLS 2017.

Food/beverage

3.32 The estimated base year expenditure currently attracted to food and beverage facilities in the three authorities in 2017 is estimated to be (see Table 5 in Appendix 4):

- Bournemouth Borough £425.07 million;
- Christchurch Borough £108.57 million; and
- East Dorset District £130.49 million.

3.33 These figures are marginally higher than those estimated in the JRLS 2017, due to the change in price base from 2015 to 2017.

Future convenience goods floorspace capacity

3.34 The future level of available convenience goods expenditure at 2023 and 2028 for Bournemouth, Christchurch and East Dorset is shown at Tables 6 to 8 in Appendix 2, with horizon years for 2033. The total level of convenience goods expenditure available between 2017 and 2033 is summarised in Table 11 (Appendix 2).

3.35 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus or deficit expenditure. The benchmark turnover of existing convenience goods floorspace is expected to increase in the future. Experian's recommended growth rates for turnover efficiency have been applied (as set out in the methodology statement in Appendix 1).

3.36 Allowing for growth in turnover efficiency, remaining surplus expenditure should be available to support new development/or the re-occupation of vacant space. The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12 (Appendix 2). Expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,239 per sq.m, the average turnover density of the main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops.

Bournemouth

3.37 Convenience expenditure available to shopping facilities in the Borough is expected to increase from £420.44 million in 2017 to £445.29 million in 2028. Within the Borough, there is an expenditure deficit of -£50.80 million convenience goods expenditure at 2017. This deficit will reduce to -£38.32 million in 2028. Future growth (primarily population growth) will decrease the deficit to -£27.78 million in 2033. The convenience goods gross floorspace projections are summarised in Table 3.1.

3.38 The previous projections in the JRLS 2017 suggested capacity for 759 sq.m net (1,054 sq.m gross) by 2033. The updated projections show no floorspace capacity at 2033. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency.

Table 3.1 Summary of Convenience Goods Floorspace Projections (sq.m gross) – Bournemouth

Location	By 2023	By 2028
Bournemouth	0	0

Source: Table 12 in Appendix 2

3.39 These projections suggest there is no need to allocate further sites for convenience goods shopping in Bournemouth for the foreseeable future (up to and beyond 2028).

Christchurch

3.40 Convenience expenditure available to shopping facilities in Christchurch Borough is expected to increase from £148 million in 2017 to £156.88 million in 2028. Within the Borough, there is an expenditure surplus of £16.89 million convenience goods expenditure at 2017. The food store commitment at the Beagle site is still extant, if implemented it would create an expenditure deficit of -£9.16 million in 2023 and -£5.68 million at 2028. Future growth (primarily population growth) will decrease the deficit to -£1.72 million in 2033. The convenience goods gross floorspace projections are summarised in Table 3.2. There is no need to allocate further sites for convenience goods shopping in Christchurch for the foreseeable future (up to and beyond 2028).

Table 3.2 Summary of Convenience Goods Floorspace Projections (sq.m gross) – Christchurch

Location	By 2023	By 2028
Christchurch	0	0

Source: Table 12 in Appendix 2

3.41 The previous projections in the JRLS 2017 suggested capacity for 173 sq.m net (247 sq.m gross) by 2028. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency.

East Dorset

3.42 Convenience expenditure available to shopping facilities in East Dorset is expected to increase from £192.55 million in 2017 to £201.49 million in 2028. Within East Dorset, there is a small expenditure deficit of -£0.77 million convenience goods expenditure at 2017, this deficit relates to eastern half of the District (e.g. Ferndown and Verwood). There is a surplus (+9.13 million) in the Wimborne area. These projections, summarised in Table 3.3, suggest there is only scope for two small convenience stores (about 400 sq.m gross) in the west of the District.

Table 3.3 Summary of Convenience Goods Floorspace Projections (sq.m gross) – East Dorset

Location	By 2023	By 2028
East Dorset (east)	0	0
East Dorset (west)	771	871

Source: Table 12 in Appendix 2

3.43 The implementation of retail commitments retail facilities at West Parley and Sainsbury's extension at Ferndown will absorb expenditure growth in the eastern half of the District up to up 2033. There is no need to allocate further sites, over and above commitments, for convenience goods shopping in the east area of the District for the foreseeable future (up to and beyond 2028).

3.44 In the west of the District (focused around Wimborne) there is an expenditure surplus at 2017 (+£9.13 million). The implementation of retail facilities at North Wimborne will reduce this surplus to +£6.75 million in 2023. The surplus will increase to +£7.66 million in 2028.

3.45 The previous projections in the JRLS 2017 suggested capacity for 1,092 sq.m net (1,560 sq.m gross) in East Dorset West by 2028. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency.

Future comparison goods floorspace capacity

3.46 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). It is assumed that the turnover of comparison floorspace will increase in real terms in the future. Experian's recommended growth rates for turnover efficiency have been applied (as set out in the methodology statement in Appendix 1).

3.47 The projected turnover of existing floorspace is subtracted from the expenditure projections to provide an estimate of surplus expenditure available to support new floorspace.

3.48 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 10 in Appendix 3, adopting an average sales density of £6,000 per sq.m net in 2017, which is projected to grow in line with Experian's recommended growth rates for turnover efficiency.

Bournemouth

3.49 In Bournemouth there is a comparison expenditure surplus of +£12.91 million by 2023, increasing to +£64.56 million by 2028. The 2028 surplus expenditure could support 8,082 sq.m net (10,776 sq.m gross). The previous projection in the JRLS 2017 was 23,521 sq.m net (31,361 sq.m gross) at 2028. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency (the growth in turnover achieved by existing floorspace).

3.50 Based on the current distribution of comparison goods turnover, the gross floorspace projections are broken down in Table 3.4.

3.51 By 2033 the comparison goods surplus could increase to +£157.71 million, but this very long-term projection is uncertain and will need to be monitored and reviewed. The very long-term the comparison goods expenditure surplus could support 17,622 sq.m net (23,497 sq.m gross).

Table 3.4 Summary of Comparison Goods Floorspace Projections (sq.m gross) - Bournemouth

Location	By 2023	By 2028
Bournemouth town centre	474	2,948
Boscombe	136	489
Castlepoint	1,315	5,144
Other Bournemouth	524	2,196
Total	**2,450**	**10,776**

Source: Table 10 in Appendix 3

3.52 It should be noted that the distribution of floorspace projections between destinations in Bournemouth is based on existing market shares, which are assumed to remain constant in the future. For example, the existing market shares suggest Castlepoint's turnover (£376 million) is higher than Bournemouth town centre (£290 million), therefore the constant market share based floorspace projections for the latter is lower. There may be potential to redistribute floorspace projection between destinations in the future.

Christchurch

3.53 Allowing for commitments and increases in turnover efficiency, in Christchurch Borough there is a small comparison goods expenditure deficit of -£1.03 million in 2023. By 2028 there will be a surplus of +£8.77 million. The 2028 surplus expenditure could support 1,099 sq.m net (1,465 sq.m gross). The gross floorspace projections are summarised in Table 3.5.

Table 3.5 Summary of Comparison Goods Floorspace Projections (sq.m gross) – Christchurch

Location	By 2023	By 2028
Christchurch Borough	0	1,465

Source: Table 10 in Appendix 3

3.54 The previous projection in the JRLS 2017 was 4,119 sq.m net (5,492 sq.m gross) at 2028. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency.

3.55 By 2033 the surplus could increase to +£27.29 million. The long-term comparison goods expenditure surplus could support 3,049 sq.m net (4,066 sq.m gross).

East Dorset

3.56 Allowing for commitments and increases in turnover efficiency, in East Dorset District there is a comparison goods expenditure deficit of -£8.51 million in 2023. By 2028 there will be a surplus of +£1.64 million in the west area of the District. The 2028 surplus expenditure could support, increasing to £15.5 million by 2028. The 2028 surplus expenditure could support 205 sq.m net (273 sq.m gross). The gross floorspace projections are broken down in Table 3.6.

Table 3.6 Summary of Comparison Goods Floorspace Projections (sq.m gross) – East Dorset District

Location	By 2023	By 2028
East Dorset (east)	0	0
East Dorset (west)	0	273
Total	**0**	**273**

Source: Table 11 in Appendix 3

3.57 The previous projection in the JRLS 2017 was 2,078 sq.m net (2,770 sq.m gross) at 2028. The main reasons for this reduction is the lower population growth projections and Experian's higher forecast growth in turnover efficiency.

3.58 By 2033 there is a projected expenditure surplus of +£7.83 million. The long-term comparison goods expenditure surplus could support 875 sq.m net (1,167 sq.m gross).

Future Capacity for Food and Beverage Floorspace

3.59 Available food/beverage expenditure has been projected forward to 2023, 2028 and 2033 in Tables 7 to 9 in Appendix 4, and summarised in Table 10. The projected turnover of existing floorspace is subtracted from the expenditure projections to provide an estimate of surplus expenditure available to support new floorspace. The food/beverage expenditure surplus is converted into gross floorspace projections at Table 11 in Appendix 4, adopting an average sales density of £5,000 per sq.m gross in 2017.

Bournemouth

3.60 Available food and beverage expenditure to facilities within Bournemouth Borough is expected to increase from £425.07 million in 2017 to £545.04 million in 2033. For the purposes of this assessment, the existing food/ beverage floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). Table 10 assumes that the turnover of food and beverage facilities in Bournemouth Borough will increase in real terms in the future. A growth rate of 1% per annum is adopted, and this growth is required to maintain the health and viability of town centres.

3.61 Taking account of the build-up of trade at the BH2 cinema and restaurant complex, in Bournemouth Borough there is a food/beverage expenditure deficit of -£10.15 million in 2023. By 2028 there is a projected small surplus, which could support 1,484 sq.m gross. Based on the current distribution of food/beverage turnover, the gross floorspace projections are broken down in Table 3.7.

Table 3.7 Summary of Food and Beverage Floorspace Projections (sq.m gross) - Bournemouth

Location	By 2023	By 2028
Bournemouth town centre	0	0
Boscombe	45	126
Castlepoint	49	128
Other Bournemouth	504	1,231
Total	**597**	**1,484**

Source: Table 11 in Appendix 4

3.62 The previous projection in the JRLS 2017 was 4,043 sq.m gross at 2028. The main reasons for this reduction is the lower population and expenditure growth projections.

3.63 By 2033 the surplus could increase to +£14.95 million. The long-term food/beverage expenditure surplus could support 2,549 sq.m gross.

Christchurch

3.64 Available food/beverage expenditure to facilities within Christchurch Borough is expected to increase from £108.57 million in 2017 to £127.31 million in 2033. By 2023 within Christchurch Borough there will be a food/beverage expenditure surplus of +£3.41 million. By 2028, future expenditure growth generates an expenditure surplus of +£7.61 million, which will grow to

£11.88 million by 2033. These expenditure projections have been converted into floorspace projections in Table 11 in Appendix 4. The gross floorspace projections are shown in Table 3.8.

Table 3.8 Summary of Food and Beverage Floorspace Projections (sq.m gross) - Christchurch

Location	By 2023	By 2028
Christchurch Borough	643	1,364

Source: Table 11 in Appendix 4

3.65 The previous projection in the JRLS 2017 was 2,184 sq.m gross at 2028. The main reasons for this reduction is the lower population and expenditure growth projections.

3.66 By 2033 the surplus could increase to +£11.88 million. The long-term food/beverage expenditure surplus could support 2,026 sq.m gross.

East Dorset

3.67 Available food/beverage expenditure to facilities East Dorset is expected to increase from £130.49 million in 2017 to £153 million in 2033. By 2023 there will be a food/beverage expenditure surplus of +£3.87 million. By 2028, future expenditure growth generates an expenditure surplus of +£8.11 million.

3.68 These expenditure projections have been converted into floorspace projections in Table 11 in Appendix 4. The gross floorspace projections are broken down in Table 3.9.

Table 3.9 Summary of Food and Beverage Floorspace Projections (sq.m gross) – East Dorset

Location	By 2023	By 2028
East Dorset (east)	237	507
East Dorset (west)	492	947
Total	**729**	**1,454**

Source: Table 11 in Appendix 4

3.69 The previous projection in the JRLS 2017 was 2,416 sq.m gross at 2028. The main reasons for this reduction is the lower population and expenditure growth projections.

3.70 By 2033 the surplus could increase to +£12.46 million. The long-term food/beverage expenditure surplus could support 2,126 sq.m gross.

4.0 Accommodating growth

Introduction

4.1 The National Planning Policy Framework (NPPF) indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres, for a least 10 years.

4.2 To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF indicates local planning authorities should apply a sequential approach for development.

4.3 The floorspace projections set out in the previous section assume that other competing centres will improve in the future. There are a several issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

1. major retail developments in competing centres e.g. Poole and Southampton;
2. the re-occupation of vacant retail floorspace;
3. the availability of land to accommodate new development;
4. the reliability of long-term expenditure projections beyond 2028 due to greater margins of error;
5. the effect of internet/home shopping on the demand for retail property;
6. the level of operator demand for floorspace in smaller centres, recognising the polarisation of investment within larger centres; and
7. the ability to maintain existing market share of expenditure in the future in the face of increasing competition.

4.4 Projections up to 2028 should be realistic and are based on up to date forecasts, which take account of uncertainties surrounding Brexit. The longer-term floorspace projections (up to 2033) 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 management decisions. Long-term forecasts may be subject to change due to unforeseen circumstances. 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.

4.5 The expenditure projections in this study take account of home shopping made through non-retail businesses, because special forms of trading have been excluded. The study update adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Accommodating growth and floorspace projections

4.6 As indicated in the previous JRLS 2017, the existing stock of premises will have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

Bournemouth Borough

4.7 The quantitative assessment of the potential for new retail and food/beverage floorspace within the previous section suggests there is scope for new development within Bournemouth up to 2028, as summarised in Table 4.1.

4.8 The projections up to 2028 suggest there is scope for 10,776 sq.m gross of comparison goods floorspace and 1,484 sq.m gross of Class A3 to A5 food/beverage space. In total 12,260 sq.m gross could be provided by 2028. The 2033 horizon year figure is 26,046 sq.m gross.

Table 4.4.1 Summary of Floorspace Projections to 2028 (sq.m gross) - Bournemouth

	Convenience Retail	Comparison Retail	Food/Beverage	**Total**
Bournemouth Borough	0	10,776	1,484	**12,260**

Source: Appendix 2, 3 and 4

4.9 There were 262 vacant Class A shop units within the 13 defined centres in Bournemouth Borough (January 2017), an overall vacancy rate of 12.9%, which was marginally higher than the Goad national average (11.2%) at that time. Bournemouth, Boscombe, Boscombe East, Kinson and Tuckton had particularly high vacancy rates when compared with the national average (between 14.8% to 20%).

4.10 As a realistic target, the future strategy should continue to seek to halve the current vacancy rate to around 6% to 7%, which is the pre-recession average. If the vacancy rate can be halved in the Borough there could be potential for re-occupied vacant space (assuming an average floorspace per unit of 100 sq.m gross in Bournemouth town centre and 50 sq.m gross in other centres) to accommodate the following new floorspace:

- Bournemouth Town Centre 4,700 sq.m gross
- Boscombe 1,800 sq.m gross
- Boscombe East 300 sq.m gross
- Charminster 300 sq.m gross
- Holdenhurst 100 sq.m gross
- Kinson 200 sq.m gross
- Moordown 200 sq.m gross
- Southbourne 300 sq.m gross
- Tuckton 300 sq.m gross
- Westbourne 200 sq.m gross
- Winton 400 sq.m gross
- The rest Borough 200 sq.m gross

4.11 On this basis, reoccupied vacant shop units could, as a maximum, accommodate up to 9,000 sq.m gross. If this reduction in vacant units can be achieved then the overall retail and food/beverage floorspace projection for the Borough up to 2028 would reduce from 12,260 sq.m gross to 3,260 sq.m gross. Vacant shop units could absorb all the projected floorspace requirement up to 2023 and over 70% of the projection up to 2028.

4.12 The JRLS 2017 review of the potential development sites included within the Bournemouth Town Centre Area Action Plan (AAP, 2013) identified 13 sites within or on the edge of Bournemouth town centre that could accommodate new floorspace.

4.13 In terms of potential capacity, these sites, if delivered, could theoretically accommodate an uplift of retail floorspace of up to 40,000 sq.m gross, which would be more than sufficient to meet the Borough wide projections up to 2033 (26,046 sq.m gross).

4.14 With the reoccupation of vacant floorspace (9,000 sq.m gross), further development sites are only required to accommodate a further 3,300 sq.m gross, increasing to 17,000 sq.m gross by 2033. Vacant floorspace in the Borough's centres and development opportunities in Bournemouth Town Centre could accommodate all the very long-term floorspace projection up to 2033.

Christchurch Borough

4.15 The quantitative assessment of the potential for new retail and food/beverage floorspace within the previous section suggests there is some limited scope for new development within Christchurch Borough up to 2028, as summarised in Table 4.2.

4.16 The projections up to 2028 suggest there is scope for 1,465 sq.m gross of comparison goods floorspace and 1,364 sq.m gross of Class A3 to A5 food/beverage space. In total 2,829 sq.m gross could be provided by 2028. The 2033 horizon year figure is 6,092 sq.m gross

Table 4.2 Summary of Floorspace Projections to 2028 (sq.m gross) - Christchurch

	Convenience Retail	Comparison Retail	Food/Beverage	**Total**
Christchurch Borough	0	1,465	1,364	**2,829**

Source: Appendix 2, 3 and 4

4.17 If half the existing vacant floorspace in Christchurch Town Centre and Highcliffe is reoccupied then there could be potential for re-occupied vacant space to accommodate 2,200 sq.m gross. If this reduction in vacant units can be achieved, then the overall floorspace projection for Christchurch Borough would reduce from 2,829 sq.m gross to 629 sq.m gross by 2028.

4.18 Vacant shop units could absorb all the projected floorspace requirement up to 2023 and over 75% of the projection up to 2028.

4.19 The JRLS 2017 review of potential development sites identified 5 opportunities within the Borough. The three opportunity areas located within the primary shopping areas in Christchurch Town Centre (Magistrates Courts, The Lanes and Saxon Square) in terms of potential capacity, could accommodate up to around 2,700 sq.m gross, which could increase to 4,700 sq.m if a more comprehensive redevelopment/expansion of Saxon Square was implemented. An application has recently been submitted on the Magistrates Court site, and the development proposals include 612 sq.m gross of flexible commercial/community space (Class A1 to A4, B1 and D1). If implemented then this would reduce the capacity of the three opportunity sites from 2,700 sq.m gross to 2,100 sq.m gross.

4.20 With the reoccupation of vacant floorspace (2,200 sq.m gross) and development opportunities (2,100 sq.m gross) there is more than sufficient scope to accommodate all of the floorspace projection up to 2028 (2,829 sq.m gross). Furthermore, vacant floorspace and development opportunities could accommodate 70% of the very long-term floorspace projection up to 2033 (6,092 sq.m gross). Comprehensive redevelopment of Saxon Square could accommodate all residual growth.

East Dorset District

4.21 The quantitative assessment of the potential for new retail and food/beverage floorspace within the previous section suggests there is some limited scope for new development within East Dorset District up to 2028, as summarised in Table 4.3.

Table 4.3 Summary of Floorspace Projections to 2028 (sq.m gross) – East Dorset

	Convenience Retail	Comparison Retail	Food/Beverage	**Total**
East Dorset - East	0	0	507	**507**
East Dorset - West	871	273	947	**2,091**
Total	**871**	**273**	**1,454**	**2,598**

Source: Appendix 2, 3 and 4

4.22 In total 2,598 sq.m gross could be provided by 2028. The 2033 horizon year figure is 4,283 sq.m gross.

4.23 There is some potential for vacant floorspace within Ferndown, Verwood and Wimborne to accommodate growth, i.e. about 1,000 sq.m gross, which accounts for around a third of the floorspace projection up to 2028. Taking account vacant shop units, further sites to accommodate around 1,600 sq.m gross should to be identified up to 2028.

4.24 The JRLS 2017 review of potential development sites identified only 3 opportunities within Verwood and Ferndown, which could accommodate up to around 3,000 sq.m gross.

4.25 With the reoccupation of vacant floorspace (1,000 sq.m gross) and development opportunities (3,000 sq.m gross), there is more than sufficient scope to accommodate all the floorspace projection up to 2028 (2,598 sq.m gross). Furthermore, vacant floorspace and development opportunities could accommodate over 90% of the very long-term floorspace projection up to 2033 (4,283 sq.m gross).

4.26 As indicated in the JRLS 2017, East Dorset has strategic housing allocations that may include local shops and services to cater for the needs of new residents within these schemes. The commitments at West Parley and North Wimborne have been included within the update capacity assessment.

4.27 Other major residential developments could include local shopping provision. Residual growth should be focused in the main town and district centres where there are the best prospects for attracting investment. Development within centres is likely to be small in-fill development, shop extensions and expansion into upper floors.

5.0 Conclusions and recommendations

5.1 The revised NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. The needs for retail and other main town centre uses should be met for at least 10 years and not compromised by limited site availability.

5.2 Long-term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Long term projections must be treated with caution and kept under review, particularly projections between 2028 and 2033.

Convenience goods floorspace

5.3 The quantitative assessment of the potential capacity for retail floorspace suggests that there is limited scope for new convenience goods development within Bournemouth and Christchurch, but some potential in the western area of East Dorset. The convenience goods projections suggest new floorspace could be distributed as shown in Table 5.1.

5.4 The floorspace projections in Table 5.1 do not take account of the proposed Asda store at Bailey Drive. This food store permission has lapsed and an alternative use is now proposed on the site.

Table 5.1 Convenience Goods Floorspace Projections (sq.m gross)

	Additional Floorspace sq.m Gross		
	2017-2023	2023-2028	2017-2028 Total
Bournemouth	0	0	**0**
Christchurch	0	0	**0**
East Dorset (east)	0	0	**0**
East Dorset (west)	771	100	**871**
TOTAL	**771**	**100**	**871**

Source: Table 12 in Appendix 2.

5.5 The horizon projections at 2033 are:

- Bournemouth 0 sq.m gross;
- Christchurch 0 sq.m gross;
- East Dorset (east) 0 sq.m gross; and
- East Dorset (west) 990 sq.m gross.

Comparison goods floorspace

5.6 The comparison goods projections suggest new floorspace could be distributed as shown in Table 5.2. The projections assume that new development will retain the three authorities' share of comparison expenditure in the study area and will help to maintain this share in the future.

Table 5.2 Comparison Goods Floorspace Projections (sq.m gross)

	Additional Floorspace sq.m Gross		
	2017-2023	2023-2028	2017-2028 Total
Bournemouth	2,450	8,326	**10,776**
Christchurch	0	1,465	**1,465**
East Dorset (east)	0	0	**0**
East Dorset (west)	0	273	**273**
TOTAL	**2,450**	**10,064**	**12,514**

Source: Table 10 in Appendix 3.

5.7 The horizon projections at 2033 are:

- Bournemouth 23,497 sq.m gross;
- Christchurch 4,066 sq.m gross;
- East Dorset (east) 111 sq.m gross; and
- East Dorset (west) 1,167 sq.m gross.

Food and beverage floorspace

5.8 The food and beverage projections suggest new floorspace could be distributed as shown in Table 5.3. Designated centres in the study area generally have a good provision of food and beverage outlets. Growth in expenditure should provide opportunities to improve food and beverage provision within all towns.

Table 5.3 Food and Beverage Floorspace Projections (sq.m gross)

	Additional Floorspace sq.m Gross		
	2017-2023	2023-2028	2017-2028 Total
Bournemouth	597	887	**1,484**
Christchurch	643	721	**1,364**
East Dorset (east)	237	270	**507**
East Dorset (west)	492	455	**947**
TOTAL	**1,969**	**2,333**	**4,302**

Source: Table 11 in Appendix 4.

5.9 The horizon projections at 2033 are:

- Bournemouth 2,549 sq.m gross;
- Christchurch 2,026 sq.m gross;
- East Dorset (east) 754 sq.m gross; and
- East Dorset (west) 1,371 sq.m gross.

Development strategy implications

5.10 The revised NPPF still states that, when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.

5.11 The revised NPPF does not refer to primary and secondary shop frontages. The aim of the new NPPF appears to create more flexibility and encourage positive strategies for town centres.

However, the primary shopping area (PSA) is still the defined area where retail development is concentrated.

5.12 The designation of town centre boundaries and PSA remain important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and to determine whether a retail impact assessment is required. These boundaries are also important in determining what locations will represent appropriate edge of centre locations for retail and other main town centre uses.

5.13 The NPPF indicates that the first preference for retail uses should be the PSA, which will comprise a defined area where retail development is concentrated. This suggests new retail uses outside the PSA, but still within the town centre boundary, could be edge of centre in planning policy terms and therefore subject to the impact and sequential tests.

5.14 The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

5.15 The revised NPPF does not suggest policies relating to the mix of Class A and non-Class A uses within primary and secondary shop frontages (PSF and SSF) should not be adopted, but implies a more flexible approach should be considered.

5.16 Town centres should provide a range of and mix complementary uses. A balance between retail, entertainment and leisure activity helps town centres compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings. This approach is recognised in the revised NPPF, and it is necessary to review the PSF and SSF designations and the policy approach within these areas.

5.17 The lower revised floorspace projections for Bournemouth, Christchurch and East Dorset imply more flexible approaches could be adopted, particularly in relation to the mix of Class A1, other Class A use and non-Class A main town centre uses. The need for a more flexible approach, particularly in centres with higher vacancy rates than average or concentrations of vacant units, should be considered in emerging development plan policies.

5.18 However, in smaller centres it is necessary to retain a critical mass of shops and services, to ensure the vitality and vitality of the centre is maintained. Controls to maintain local access to shops and services needs to be considered. The appropriate approach should be considered on a centre by centre basis, one approach is unlikely to be suitable for all centres.

5.19 There are four broad policy approaches that could be adopted, as follows:

- strengthening shop frontages policies to provide more control over the loss of Class A1 retail uses. This would usually involve extending the areas of protected frontages and/or reducing the maximum threshold for non-retail uses;
- retaining the current development plan policies that seek to control the extent of non-retail uses within designated frontages;
- relaxing shop frontages policies to allow a more flexible approach to enable more non-retail uses. This would usually involve reducing the areas of protected frontage, increasing the maximum threshold for non-retail uses or the introduction of a criterion based policy; or
- a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.

5.20 The NPPF (paragraph 85) indicates that policies can make clear the range of uses that will be permitted in town centres and PSA, as part of a positive strategy for the future of each centre. A balanced mix of uses is required in town centres, which promotes growth. There is a reasonable degree of flexibility for local authorities to take account local circumstances during the plan making process, and in this respect the revised NPPF is not prescriptive.

5.21 The suitability of the approach in Bournemouth, Christchurch and East Dorset needs to be considered in the context of recent changes in the mix of uses within frontages, the floorspace projections and changes to the General Permitted Development Order (GPDO). The changes to the GPDO will have an impact on the effectiveness of frontage policies. These measures allow for greater flexibility for changes of use from retail to non-retail uses subject to Prior Approval e.g. Class A uses to C3 residential use and Class A1 to non-A1 uses. These measures could change the composition of town centres, including the amount of Class A1 space could reduce where shop units are predominantly small (less than 150 sq.m gross). The ability to control non-A1 uses has diminished and the need to protect larger retail units may have increased.

Bournemouth Borough

5.22 The floorspace projections above provide broad guidance. Meeting the projections to 2028 is the priority. The overall Class A1 to A5 floorspace projection for the Borough up to 2028 is 12,260 sq.m gross.

5.23 Based on the scale of facilities available within each settlement and the revised floorspace projections in this update study, the current retail hierarchy set out in figure 1 of the Core Strategy remains appropriate and no changes are considered necessary.

5.24 A wide Town Centre Boundary is shown on the proposals maps around Bournemouth Town Centre. A Primary Shopping Area (PSA) is defined around the focus of retail activity. A Central Area is also defined for leisure, culture and entertainment proposals; and a Cumulative Impact Area in relation to Evening and Night time uses.

5.25 At present the boundaries for the District Centres are not defined on the proposals maps. 'Core Shopping Areas' and 'Secondary Shopping Areas' are currently defined. To make the policies consistent with the revised NPPF consideration should be given to defining District Centres Boundaries on the proposals maps, this could appropriately encompass commercial buildings currently identified as Core or Secondary Shopping Areas.

5.26 As indicated Volume 2 of the JRLS 2017, there is scope for confusion with the application of these different boundaries. Core Strategy Policy CS7, which relates to how the sequential approach will be applied at present, states that: "Bournemouth Town Centre… will be the most appropriate location in the Borough for development consisting of retail, cultural, leisure and business uses, or mixed uses development consisting of these uses". To help clarify the application of sequential and impact tests, cross reference within CS7 to the Primary Shopping Area being the focus in relation to retail; and the Central Area in terms of leisure, culture and entertainment uses should be considered.

5.27 Policy U5 in the AAP appropriately seeks to focus new retail growth in Bournemouth Town Centre and within the Primary Shopping Area. This policy indicates that provision of a minimum of 23,410 sq.m net for retail comparison by 2026. The update comparison floorspace projections up to 2028 for the Borough is 8,082 sq.m net, which is much lower than the floorspace figure suggested in Policy U5 for 2026 (two years earlier) for the town centre on its own.

5.28 The short-term priority remains the reoccupation of vacant floorspace in centres. As a realistic maximum target, reoccupied vacant shop units could accommodate up to 9,000 sq.m gross, about 70% of the Class A1 to A5 floorspace projection up to 2028 (12,260 sq.m gross). The application of existing shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist their reoccupation.

5.29 The identified development sites in the Bournemouth town centre AAP, can accommodate any residual capacity and long-term growth after 2028.

5.30 AAP policy controls the loss of A1 uses within the town centre designated primary frontages and Class A1 to A3 uses in secondary frontage, subject to criteria relating to the positive contribution to diversification, complementing the retail character, vitality and viability and preventing concentrations of non-retail uses. AAP policy also controls food and beverage uses where there is an impact on residential amenities or the character of the street. Evening and night-time uses are also controlled.

5.31 Given the special circumstances in Bournemouth, as a major tourist destination, the retention of criteria based policies to control uses is still appropriate particularly in town and district centres. The suggested amendments to the primary, secondary and tertiary frontages in the Volume 2 JRLS 2017 remain valid. However, some additional flexibility for non-A1 uses within primary frontages could be considered, subject to other criteria.

5.32 Policies for enhancing and protecting district and local centres retain a high degree of flexibility, whilst seeking to maintain the health of the centre.

Christchurch and East Dorset

5.33 The analysis of the scale and role of centres and the revised retail floorspace projections in this update, indicate that the current retail hierarchy as set out in Policy KS6 remains appropriate and no changes are considered necessary. None of the centres are in decline and the vitality and viability of all centres should be maintained.

5.34 The JRLS 2017 indicated that if the NPPF threshold was adopted, then a single out of centre retail development proposal could exceed the entire short term (up to 2023) floorspace projections for the Borough or District, without the need for a retail impact assessment. As a result, the NPPF minimum threshold of 2,500 sq.m gross was considered inappropriate as a blanket threshold across Christchurch Borough and East Dorset District and a reduced threshold was recommended.

5.35 The Volume 2 JRLS 2017 concluded the impact thresholds as set out in Core Strategy Policy KS7 remain appropriate i.e. 1,000 sq.m gross for Christchurch, Ferndown and Wimborne and 500 sq.m gross in all other areas. The updated floorspace capacity projections are now lower, which reinforces the need for lower impact thresholds than suggested in the NPPF.

5.36 The retail capacity projections and analysis of potential development sites within the main centres, indicate that it is not necessary to designate Christchurch Retail Park, Meteor Shopping Park or Stony Lane Retail Park as town or district centres to accommodate future growth. Development proposals within these out of centre locations should continue to comply with the sequential and impact tests, to protect the vitality and viability of the network of centres.

5.37 In all centres a centre boundary or primary shopping area (PSA) should be defined on the proposals map, for the application of the sequential approach, i.e. to clearly indicate what is in-centre, edge-of-centre and out-of-centre.

Christchurch

5.38 In Christchurch the town centre boundary is widely drawn, including employment and residential areas adjacent to the main shopping area. Within the town centre boundary, it is necessary to define a PSA to clearly show where retail uses will be concentrated. Nearly all retail units and contiguous shop frontages in the town centre are located within the PSA. As currently drawn, non-retail town centre uses located within the extended town centre boundary would not be required to comply with the sequential approach to site selection, and in this respect, there is a high degree of flexibility to encourage new town centre development/uses within the wider town centre boundary.

5.39 For retail uses, any proposal within 300 metres of the PSA would be edge of centre, with preference given to sites within the PSA. Large areas within the defined town centre boundary are more than 300 metres from the PSA and would be out of centre, for example sites on Stony Lane.

5.40 It has been previously suggested that the PSA could be extended along Bridge Street to bring sites on Stony Lane into the edge of centre area of search for retail uses, but retail frontages along Bridge Street are fragmented and the extent of any amended PSA is unclear. Furthermore, the NPPF gives preference to accessible edge of centre and out of centre sites that are well connected to the town centre. Rather than extend the PSA, future policy could indicate that preference will be given to sites located within the defined town centre boundary for retail uses that cannot be located within the PSA, therefore sites within the centre boundary would be given preference over other out of centre sites. No change to the current PSA is considered necessary.

5.41 The two areas of Primary Shopping Frontages (PSF) include a relatively large part of the PSA. The proportion of non-retail uses already exceeds 30%. Most units within the Bargates PSF are small (below 150 sq.m) and the ability to control changes of use is more limited.

5.42 The Council should consider removing the Secondary Shopping Frontages (SSF) in Bargates and re-designating the PSF to SSF. For the PSF in the High Street and Saxon Square more flexibility could be introduced. There are two main options to introduce more flexibility. First, a criterion based policy rather than a percentage threshold could be introduced. This approach would allow each change of use/development to be considered on a case by case basis. The criteria are likely to include factors relating to dead frontages, amenity (for food/beverage uses), length of time the unit has been vacant/marketed and the likely implications of the new use on the centre's vitality and viability, i.e. the footfall generated. However, criterion based policies can be subjective and difficult to defend, and provide less clear guidance to applicants.

5.43 Alternatively, the current 30% threshold could be increased to provide more flexibility, for example to 35% or 40%. It is reasonable to assume the PSF will retain a predominance of Class A1 use, and therefore a threshold of over 40% is not recommended because this could undermine the retail role of the centre. The existing shop vacancy rate, extensive areas of SSF and flexibility introduced by changes to the GPDO do not suggest a significant increase in the threshold is necessary.

Highcliffe

5.44 In Highcliffe, as previously recommended, the PSF should be re-designated as SSF, because the non-retail threshold has been breached and the small shop units are no longer protected against changes of use due to changes to the GPDO. Nearly all units are small (under 150 sq.m).

Ferndown

5.45 Ferndown is a compact centre and the designated town centre boundary is appropriately drawn. Policy FWP1 clearly indicates where retail and other main town centre uses should be concentrated, and this approach is consistent with the revised NPPF.

5.46 The PSA includes most of the area within the town centre boundary. Retail units and contiguous frontages are located within the PSA. The need for a separate PSA and a town centre boundary is unclear. The PSF includes about one third of the centre's shop frontages. The SSF provides a high degree of flexibility. The proportion of non-retail uses already exceeds 30% in the PSF, but most of the centre's large retail units (over 150 sq.m) are within the PSF. Given the significant flexibility offered in the SSF and the GPDO, an increase in the threshold is not considered necessary, nor is the introduction of a criterion based policy.

5.47 Ferndown is a relatively small centre that performs an important role in serving the local community. A critical mass of retail and service uses should be retained to protect this role. The PSF frontages and should continue to be protected to maintain a predominance of Class A1 uses in the core area of the centre.

5.48 No changes to the town centre boundary or shopping frontages are considered necessary.

Verwood

5.49 Verwood is a small centre but fragmented centre. It still performs an important role in serving the local community preventing the need to travel by car to reach day to day facilities. There have been limited changes since the Core Strategy was adopted in 2014 and the Verwood's town centre boundary remains appropriate. A critical mass of retail and service uses should be retained to protect this role. However, the need for a separate PSA and a town centre boundary is unclear, particularly if the expansion of retail uses is encouraged in the future.

5.50 The PSA covers the east of the centre, which has the main concentration of shops and services. Community facilities within the west of the centre, including the Hub and surgery, are included within the town centre boundary. The removal of the PSA could encourage retail uses within the west of the centre.

5.51 There are no designated retail frontages within Verwood because shops and services are relatively fragmented.

West Moors

5.52 West Moors is a small linear centre that performs an important role in serving the local community. It has a designated centre boundary and a PSA. These boundaries are similar and the need for a separate PSA and a town centre boundary is unclear. The areas excluded from the PSA are car parks and the church. The PSA designation should be removed.

5.53 There are no designated retail frontages within West Moors District Centre. There have been limited changes since the Core Strategy was adopted in 2014 and the introduction of frontages policies is unnecessary.

Wimborne

5.54 Wimborne town centre has a widely drawn town centre boundary, with a separate Primary Shopping Area (PSA) covering a much smaller area. All contiguous shop frontages are included within the PSA. Policy WMC1 clearly indicate where retail and other main town centre uses should be concentrated, and this approach is consistent with the NPPF.

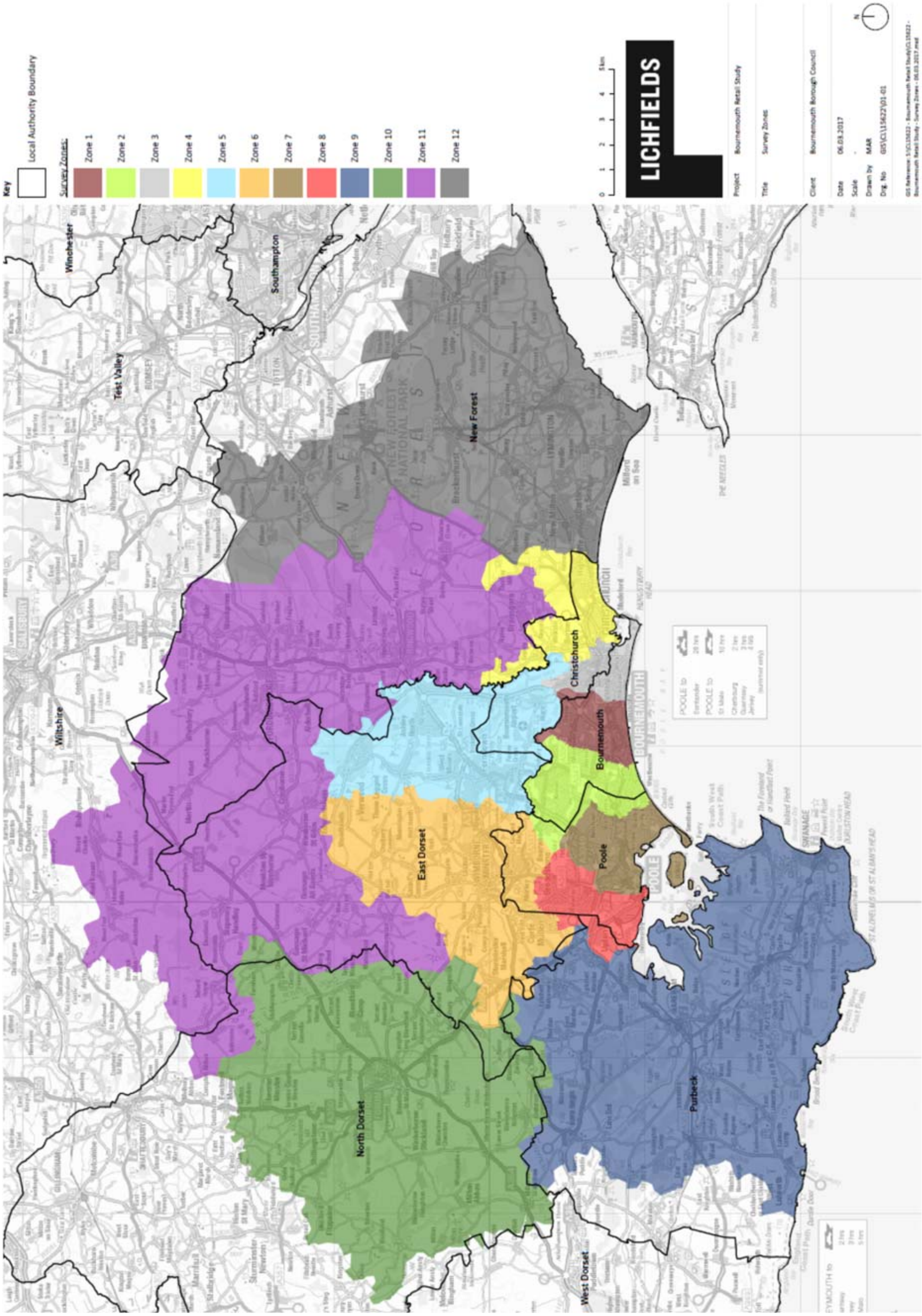
5.55 The focus of Class A1 retail units is concentrated in the High Street, The Square and Crownmead Shopping Centre. There are extensive areas of SSF in East Street, Leigh Road, West Street and West Borough, which provide flexibility for non-Class A1 uses. The town centre boundary provides a high degree of flexibility to encourage new town centre development/uses within the wider town centre.

5.56 The proportion of non-retail uses in the PSF already exceeds 30%, which implies more flexibility could be introduced i.e. a criterion based policy or an increased threshold. However, the existing low shop vacancy rate, high demand for space and changes to the GPDO do not suggest an increase in the threshold is necessary. It is reasonable to assume the PSF will retain a predominance of Class A1 use, and therefore a threshold of over 30% is not recommended.

5.57 Wimborne has maintained an appropriate mix of retail and non-retail uses. Most of the large units (over 150 sq.m) are located within the PSF. The large retail units within these frontages should continue to be protected to maintain a predominance of Class A1 uses in the core area of the centre, to maintain the vitality and viability of the centre. No changes to the town centre boundary or shopping frontages are necessary.

Appendix 1: Study area and methodology

Zone	Postcode Sector
1	BH1 1, BH1 2, BH1 3, BH1 4, BH5 1, BH5 2, BH7 6, BH7 7, BH8 0, BH8 8, BH8 9
2	BH2 5, BH2 6, BH3 7, BH4 8, BH4 9, BH9 1, BH9 2, BH9 3, BH10 4, BH10 5, BH10 6, BH10 7, BH11 8, BH11 9, BH12 1, BH12 5, BH13 6
3	BH6 3, BH6 4, BH6 5, BH23 1, BH23 2
4	BH23 3, BH23 4, BH23 5, BH23 7
5	BH21 6, BH22 0, BH22 8, BH22 9, BH23 6, BH24 2, BH31 6, BH31 7
6	BH21 1, BH21 2, BH21 3, BH21 4, BH21 7, BH21 8
7	BH12 2, BH12 3, BH12 4, BH13 7, BH14 0, BH14 8, BH14 9, BH15 1, BH15 2, BH15 3, BH17 8
8	BH15 4, BH16 5, BH17 0, BH17 7, BH17 9, BH18 8, BH18 9
9	BH16 6, BH19 1, BH19 2, BH19 3, BH20 4, BH20 5, BH20 6, BH20 7
10	DT11 0, DT11 7, DT11 8, DT11 9
11	BH21 5, BH23 8, BH24 1, BH24 3, BH24 4, SP5 5, SP6 1, SP6 2, SP6 3
12	BH25 5, BH25 6, BH25 7, SO41 0, SO41 3, SO41 5, SO41 6, SO41 8, SO41 9, SO42 7, SO43 7


Key
Local Authority Boundary
Survey Zones:
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Zone 10
Zone 11
Zone 12
LICHFIELDS
Project Bournemouth Retail Study
Title Survey Zones
Client Bournemouth Borough Council
Date 06.03.2017
Drawn by MAR
Winchester
Southampton
Test Valley
New Forest
Wiltshire
Christchurch
Bournemouth
Poole
East Dorset
North Dorset
Purbeck
West Dorset

Floorspace capacity assessment – Methodology and data

Price base

All monetary values expressed in this update report are at 2017 prices, consistent with Experian's base year expenditure figures for 2017 (Retail Planner Briefing Note 16, December 2018) which is the most up to date information available. The JRLS 2017 adopts figures at 2015 prices, and therefore is not directly comparable.

Retail and food/beverage expenditure

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 local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2017 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 16) 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 several 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.

Experian's EBS growth forecast rates for 2017 to 2020 reflect the current economic circumstances and provide an appropriate growth rate for the short term, as follows:

For convenience goods: 1% for 2017 to 2018, 0.5% for 2018 to 2019 and 0.1% from 2019 to 2020;

For comparison goods: 2.8% for 2017 to 2018, 2.6% for 2018 to 2019 and 2.8% from 2019 to 2020;

For food/beverage: 0% for 2017 to 2018, 1.3% for 2018 to 2019 and 1.0% from 2019 to 2020.

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer-term growth average forecasts have been adopted, as follows:

- 0.1% per annum for convenience goods after 2020;
- 3.3% per annum growth for comparison goods after 2020; and
- 1.2% per annum for food/beverage 1.1% after 2020.

These growth rates represent a realistic forecast annual average for future expenditure growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT 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 with 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. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2017 was:

- 11.2% of convenience goods expenditure; and
- 20.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all non-store expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian provides adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2017 were:

- 3.4% of convenience goods expenditure; and
- 15.5% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.7% and 21.6% by 2033 respectively. These figures have been adopted in this updated assessment.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after 2023.

The growth in SFT will have an impact on the demand for retail space, but some retailers operate on-line sales from their traditional retail premises e.g. food store operators and growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the likely continued growth in internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market shares/penetration Rates

To assess the capacity for new retail floorspace, penetration rates were estimated in the JRLs 2017 for shopping and food/beverage facilities in the study area. The assessment of penetration rates was based on a range of factors but primarily information gathered through the April 2017 household survey. There have been no significant changes since April 2017 that are likely to have discernibly affected shopping and leisure patterns.

The total turnover of shops and food/beverage outlets within the joint authorities was estimated based on penetration rates. These turnover estimates have been updated based on revised population and expenditure information.

For convenience goods shopping actual turnover estimates are compared with average company benchmark or average sales floorspace densities derived from Global Data 2018 information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark turnover levels

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. 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, 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.

Recent changes in convenience goods sales areas since April 2017 have been derived from the Institute of Oxford Retail Consultants (ORC) StorePoint database. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Bournemouth, Christchurch and East Dorset and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores was adopted in the JRLS 2017. This has been inflated to £5,100 per sq.m net to reflect the change in 2015 to 2017 prices in this report.

Increases in turnover densities

Experian's Retail Planner Briefing Note 16, December 2018 indicates comparison goods retail sales floorspace is expected to increase its sales density by 3.7% during in 2017 to 2018; 2.1% in 2018 to 2019; 2.1% in 2019 to 2020; 2.5% in 2020 to 2021; 2.8% per annum between 2021 and 2025; and 2.3% beyond 2025. These increases have been adopted and will absorb some of the future expenditure growth.

For convenience goods, Experian indicates sales floorspace is expected to increase its sales density by 0.7% during in 2017 to 2018; 0% in 2018 to 2019; 0.7% in 2019 to 2020; 0.4% in 2020 to 2021; 0.2% per annum between 2021 and 2025; and 0% beyond 2025.

Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, consistent with the JRLS 2017.

Appendix 2: Convenience assessment

Table 1 - Study Area Population

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	78,558	81,613	84,347	86,478
Zone 2 - Bournemouth West	115,339	119,462	123,085	125,938
Zone 3 - E. Bournemouth/W. Christchurch	42,397	44,100	45,529	46,729
Zone 4 - Christchurch East/Highclffe	31,274	32,466	33,383	34,239
Zone 5 - Ferndown/Verwood	50,928	52,412	53,625	54,678
Zone 6 - Wimborne	37,764	38,750	39,561	40,250
Zone 7 - Poole East	87,749	89,780	91,347	92,682
Zone 8 - Poole West	48,656	49,746	50,609	51,327
Zone 9 - Purbeck	37,968	38,704	39,359	39,850
Zone 10 - North Dorset	31,777	32,405	32,961	33,382
Zone 11 - Ringwood/Fordingbridge	42,641	43,712	44,560	45,299
Zone 12 - New Forest	68,545	70,068	71,325	72,467
Total	**673,596**	**693,219**	**709,691**	**723,320**
Tourism (Staying/Day Trips)	43,000	43,000	43,000	43,000

Sources:

Experian 2017 Population (MMG3)
Office of National Statistics 2016 SNPP projections
Tourism in Dorset February 2016 (overnight and day visitors)

Table 2 - Convenience Goods Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	2,041	2,035	2,035	2,039
Zone 2 - Bournemouth West	2,122	2,117	2,116	2,120
Zone 3 - E. Bournemouth/W. Christchurch	2,136	2,130	2,130	2,134
Zone 4 - Christchurch East/Highclffe	2,250	2,244	2,243	2,247
Zone 5 - Ferndown/Verwood	2,300	2,294	2,294	2,298
Zone 6 - Wimborne	2,332	2,326	2,326	2,330
Zone 7 - Poole East	2,116	2,111	2,110	2,114
Zone 8 - Poole West	2,144	2,138	2,138	2,142
Zone 9 - Purbeck	2,319	2,313	2,312	2,316
Zone 10 - North Dorset	2,208	2,202	2,202	2,206
Zone 11 - Ringwood/Fordingbridge	2,628	2,621	2,621	2,625
Zone 12 - New Forest	2,612	2,606	2,605	2,610
Tourism	986	984	983	985

Sources:
Experian Local Expenditure 2017 (2017 prices)
Growth Rates: 1% 2017-2018, 0.5% 2018-2019, 0.1% p.a. from 2019
Excludes Special Forms of Trading
Tourism in Dorset February 2016 - average shopping spend = £9 per day of which 30% assumed for convenience goods

Table 3 - Total Convenience Goods Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	160.34	166.08	171.65	176.33
Zone 2 - Bournemouth West	244.75	252.90	260.45	266.99
Zone 3 - E. Bournemouth/W. Christchurch	90.56	93.93	96.98	99.72
Zone 4 - Christchurch East/Highclffe	70.37	72.85	74.89	76.94
Zone 5 - Ferndown/Verwood	117.13	120.23	123.02	125.65
Zone 6 - Wimborne	88.07	90.13	92.02	93.78
Zone 7 - Poole East	185.68	189.53	192.74	195.93
Zone 8 - Poole West	104.32	106.36	108.20	109.94
Zone 9 - Purbeck	88.05	89.52	91.00	92.29
Zone 10 - North Dorset	70.16	71.36	72.58	73.64
Zone 11 - Ringwood/Fordingbridge	112.06	114.57	116.79	118.91
Zone 12 - New Forest	179.04	182.60	185.80	189.14
Study Area Total	**1,510.52**	**1,550.07**	**1,586.11**	**1,619.26**
Tourism	42.40	42.30	42.28	42.37
Study Area Total	**1,552.92**	**1,592.37**	**1,628.39**	**1,661.63**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Convenience Goods Market Shares By Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	7.6%	5.6%	1.5%	0.0%	0.0%	0.0%	0.3%	0.5%	1.9%	1.3%	0.6%	0.2%	65.0%
Boscombe	13.8%	1.5%	4.8%	0.0%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castlepoint	35.6%	9.5%	13.9%	3.1%	1.6%	0.6%	2.2%	0.5%	0.0%	0.4%	5.4%	1.6%	0.0%
Charminster	3.8%	0.3%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holdenhurst	7.3%	3.5%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kinson	0.0%	9.9%	0.0%	0.0%	1.4%	0.9%	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	0.9%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%
Wallisdown	0.6%	6.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Westbourne	1.9%	2.9%	0.0%	0.0%	0.0%	0.0%	0.7%	1.5%	0.0%	0.0%	0.0%	0.0%	8.0%
Winton	6.6%	11.2%	0.8%	0.0%	0.8%	0.5%	0.4%	0.2%	1.1%	1.0%	0.8%	0.0%	0.0%
Other Bournemouth	13.9%	6.5%	22.7%	2.2%	0.8%	0.0%	2.3%	0.6%	0.0%	0.0%	8.1%	0.0%	0.0%
Bournemouth Sub Total	**92.0%**	**57.7%**	**50.8%**	**5.8%**	**4.7%**	**2.0%**	**6.7%**	**3.8%**	**3.0%**	**2.7%**	**14.9%**	**1.8%**	**79.0%**
Christchurch													
Christchurch town centre	0.9%	0.8%	17.3%	13.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.4%	8.0%
Highcliffe	0.6%	0.2%	1.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	1.0%
Other Christhurch	3.7%	0.0%	29.4%	70.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	8.2%	0.0%
Christchurch Sub Total	**5.2%**	**1.0%**	**47.7%**	**88.0%**	**0.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.4%**	**10.9%**	**9.0%**
East Dorset													
Ferndown	0.4%	2.4%	0.0%	1.0%	42.1%	16.0%	0.0%	0.5%	0.4%	0.2%	5.0%	0.0%	0.0%
Verwood	0.4%	1.1%	0.0%	0.2%	30.9%	2.5%	0.9%	0.0%	0.0%	0.0%	9.6%	0.0%	2.0%
Wimborne	0.0%	0.7%	0.0%	0.0%	1.0%	36.4%	0.5%	5.9%	1.7%	2.3%	0.6%	0.0%	10.0%
West Moors	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.2%	5.0%	0.0%	2.8%	0.0%	0.3%	0.0%	0.0%	0.0%
West Parley	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
East Dorset Sub Total	**0.8%**	**4.2%**	**0.0%**	**1.2%**	**76.2%**	**59.9%**	**1.4%**	**9.2%**	**2.1%**	**2.8%**	**15.2%**	**0.0%**	**12.0%**
Other													
New Forest District	0.0%	0.9%	0.3%	4.5%	14.6%	0.6%	0.0%	0.0%	2.0%	0.0%	52.5%	73.5%	n/a
North Dorset District	0.0%	0.1%	0.0%	0.0%	0.0%	1.7%	0.1%	0.3%	0.0%	81.1%	1.8%	0.0%	n/a
Poole	1.7%	35.5%	1.0%	0.0%	2.3%	31.8%	91.7%	83.9%	31.4%	9.0%	1.7%	1.9%	n/a
Purbeck District	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.2%	51.1%	0.0%	0.0%	0.2%	n/a
Eslewhere	0.3%	0.7%	0.2%	0.5%	0.8%	4.0%	0.1%	2.6%	10.4%	4.4%	6.5%	11.7%	n/a
Other Sub Total	**2.0%**	**37.1%**	**1.5%**	**5.0%**	**18.7%**	**38.1%**	**91.9%**	**87.0%**	**94.9%**	**94.5%**	**62.5%**	**87.3%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey April 2017 (weighted results) and Tourism in Dorset February 2016 inc. Lichfields' Estimates

Table 5 - Base Year 2017 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**160.34**	**244.75**	**90.56**	**70.37**	**117.13**	**88.07**	**185.68**	**104.32**	**88.05**	**70.16**	**112.06**	**179.04**	**42.40**	**1,552.92**
Bournemouth														
Bournemouth town centre	12.19	13.71	1.36	0.00	0.00	0.00	0.56	0.52	1.67	0.91	0.67	0.36	27.56	59.50
Boscombe	22.13	3.67	4.35	0.00	0.12	0.00	1.11	0.00	0.00	0.00	0.00	0.00	0.00	31.38
Castlepoint	57.08	23.25	12.59	2.18	1.87	0.53	4.08	0.52	0.00	0.28	6.05	2.86	0.00	111.31
Charminster	6.09	0.73	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.18
Holdenhurst	11.70	8.57	1.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.36
Kinson	0.00	24.23	0.00	0.00	1.64	0.79	0.37	0.52	0.00	0.00	0.00	0.00	0.00	27.56
Southbourne	1.44	0.00	4.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.54	8.06
Wallisdown	0.96	16.64	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.87
Westbourne	3.05	7.10	0.00	0.00	0.00	0.00	1.30	1.56	0.00	0.00	0.00	0.00	3.39	16.40
Winton	10.58	27.41	0.72	0.00	0.94	0.44	0.74	0.21	0.97	0.70	0.90	0.00	0.00	43.61
Other Bournemouth	22.29	15.91	20.56	1.55	0.94	0.00	4.27	0.63	0.00	0.00	9.08	0.00	0.00	75.21
Bournemouth Sub Total	**147.51**	**141.22**	**46.00**	**4.08**	**5.51**	**1.76**	**12.44**	**3.96**	**2.64**	**1.89**	**16.70**	**3.22**	**33.49**	**420.44**
Christchurch														
Christchurch town centre	1.44	1.96	15.67	9.57	0.00	0.00	0.00	0.00	0.00	0.00	1.68	0.72	3.39	34.43
Highcliffe	0.96	0.49	0.91	2.60	0.00	0.00	0.00	0.00	0.00	0.00	0.45	4.12	0.42	9.95
Other Christhurch	5.93	0.00	26.62	49.75	0.47	0.00	0.00	0.00	0.00	0.00	6.16	14.68	0.00	103.62
Christchurch Sub Total	**8.34**	**2.45**	**43.20**	**61.92**	**0.47**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**8.29**	**19.52**	**3.82**	**148.00**
East Dorset														
Ferndown	0.64	5.87	0.00	0.70	49.31	14.09	0.00	0.52	0.35	0.14	5.60	0.00	0.00	77.24
Verwood	0.64	2.69	0.00	0.14	36.19	2.20	1.67	0.00	0.00	0.00	10.76	0.00	0.85	55.15
Wimborne	0.00	1.71	0.00	0.00	1.17	32.06	0.93	6.15	1.50	1.61	0.67	0.00	4.24	50.05
West Moors	0.00	0.00	0.00	0.00	1.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.41
Corfe Mullen	0.00	0.00	0.00	0.00	0.23	4.40	0.00	2.92	0.00	0.21	0.00	0.00	0.00	7.77
West Parley	0.00	0.00	0.00	0.00	0.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.94
East Dorset Sub Total	**1.28**	**10.28**	**0.00**	**0.84**	**89.26**	**52.75**	**2.60**	**9.60**	**1.85**	**1.96**	**17.03**	**0.00**	**5.09**	**192.55**
Other														
New Forest District	0.00	2.14	0.27	3.17	17.10	0.53	0.00	0.00	1.76	0.00	58.83	131.59	n/a	215.40
North Dorset District	0.00	0.26	0.00	0.00	0.00	1.50	0.19	0.31	0.00	56.90	2.02	0.00	n/a	61.17
Poole	2.73	86.81	0.91	0.00	2.69	28.00	170.27	87.52	27.65	6.31	1.91	3.40	n/a	418.19
Purbeck District	0.00	0.00	0.00	0.00	1.17	0.00	0.00	0.21	44.99	0.00	0.00	0.36	n/a	46.73
Eslewhere	0.48	1.59	0.18	0.35	0.94	3.52	0.19	2.71	9.16	3.09	7.28	20.95	n/a	50.44
Other Sub Total	**3.21**	**90.80**	**1.36**	**3.52**	**21.90**	**33.55**	**170.64**	**90.76**	**83.56**	**66.30**	**70.04**	**156.30**		**791.93**
TOTAL	**160.34**	**244.75**	**90.56**	**70.37**	**117.13**	**88.07**	**185.68**	**104.32**	**88.05**	**70.16**	**112.06**	**179.04**		**1,552.91**

Source: Tables 3 and 4

Table 6 - Future 2023 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**166.08**	**252.90**	**93.93**	**72.85**	**120.23**	**90.13**	**189.53**	**106.36**	**89.52**	**71.36**	**114.57**	**182.60**	**42.30**	**1,592.37**
Bournemouth	152.80	145.92	47.72	4.23	5.65	1.80	12.70	4.04	2.69	1.93	17.07	3.29	33.42	433.24
Christchurch	8.64	2.53	44.81	64.11	0.48	0.00	0.00	0.00	0.00	0.00	8.48	19.90	3.81	152.75
East Dorset (East)	1.33	8.85	0.00	0.87	90.17	16.67	1.71	0.53	0.36	0.14	16.73	0.00	0.85	138.21
East Dorset (West)	0.00	1.77	0.00	0.00	1.44	37.31	0.95	9.25	1.52	1.86	0.69	0.00	4.23	59.02
Other	3.32	93.82	1.41	3.64	22.48	34.34	174.17	92.53	84.96	67.43	71.61	159.41	n/a	809.13
TOTAL	**166.08**	**252.90**	**93.93**	**72.85**	**120.23**	**90.13**	**189.53**	**106.36**	**89.52**	**71.36**	**114.57**	**182.60**	**42.30**	**1,592.36**

Source: Tables 3 and 4

Table 7 - Future 2028 Convenience Goods Expenditure Patterns by Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**171.65**	**260.45**	**96.98**	**74.89**	**123.02**	**92.02**	**192.74**	**108.20**	**91.00**	**72.58**	**116.79**	**185.80**	**42.28**	**1,628.39**
Bournemouth	157.92	150.28	49.26	4.34	5.78	1.84	12.91	4.11	2.73	1.96	17.40	3.34	33.40	445.29
Christchurch	8.93	2.60	46.26	65.90	0.49	0.00	0.00	0.00	0.00	0.00	8.64	20.25	3.81	156.88
East Dorset (East)	1.37	9.12	0.00	0.90	92.26	17.02	1.73	0.54	0.36	0.15	17.05	0.00	0.85	141.35
East Dorset (West)	0.00	1.82	0.00	0.00	1.48	38.10	0.96	9.41	1.55	1.89	0.70	0.00	4.23	60.14
Other	3.43	96.62	1.45	3.74	23.00	35.06	177.13	94.14	86.36	68.59	72.99	162.20	n/a	824.73
TOTAL	**171.65**	**260.44**	**96.98**	**74.89**	**123.02**	**92.02**	**192.74**	**108.20**	**91.00**	**72.58**	**116.79**	**185.80**	**42.28**	**1,628.39**

Source: Tables 3 and 4

Table 8 - Future 2033 Convenience Goods Expenditure Patterns by Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**176.33**	**266.99**	**99.72**	**76.94**	**125.65**	**93.78**	**195.93**	**109.94**	**92.29**	**73.64**	**118.91**	**189.14**	**42.37**	**1,661.63**
Bournemouth	162.22	154.05	50.66	4.46	5.91	1.88	13.13	4.18	2.77	1.99	17.72	3.40	33.47	455.83
Christchurch	9.17	2.67	47.57	67.70	0.50	0.00	0.00	0.00	0.00	0.00	8.80	20.62	3.81	160.84
East Dorset (East)	1.41	9.34	0.00	0.92	94.24	17.35	1.76	0.55	0.37	0.15	17.36	0.00	0.85	144.30
East Dorset (West)	0.00	1.87	0.00	0.00	1.51	38.83	0.98	9.56	1.57	1.91	0.71	0.00	4.24	61.18
Other	3.53	99.05	1.50	3.85	23.50	35.73	180.06	95.65	87.59	69.59	74.32	165.12	n/a	839.47
TOTAL	**176.33**	**266.99**	**99.72**	**76.94**	**125.65**	**93.78**	**195.93**	**109.94**	**92.29**	**73.64**	**118.91**	**189.14**	**42.37**	**1,661.62**

Source: Tables 3 and 4

Table 9 - Convenience Goods Floorspace and Benchmark Turnover in Bournemouth

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Bournemouth	Co-operative Food, Madeira Road	333	95%	316	£10,824	£3.42
	Asda Superstore, St Pauls Road	5,465	60%	3,279	£13,659	£44.79
	Lidl, Dalkeith Arcade	715	85%	608	£10,103	£6.14
	McColls, Commercial Road	56	95%	53	£5,100	£0.27
	McColls, Old Christchurch Road	89	95%	85	£5,100	£0.43
	Tesco Express, The Triangle	301	95%	286	£13,797	£3.95
	Tesco Metro, Bourne Avenue	1,210	90%	1,089	£13,797	£15.02
	Other Bournemouth	1,376	100%	1,376	£5,100	£7.02
	Sub Total	**9,545**		**7,092**		**£81.04**
Boscombe	Aldi, Palmerston Road	948	80%	758	£10,827	£8.21
	Iceland, Christchurch Road	377	95%	358	£6,859	£2.46
	Lidl, Sovereign Shopping Centre, Christchurch Rd	1,166	80%	933	£10,103	£9.42
	Sainsbury's, Christchurch Road	1,717	85%	1,459	£11,691	£17.06
	Other Boscombe	1,765	100%	1,765	£5,100	£9.00
	Sub-Total	**5,973**		**5,274**		**£46.16**
Castlepoint	Asda Superstore, Castle Lane West	5,885	60%	3,531	£15,213	£53.72
	M&S Foodhall, Castle Lane West	1,628	95%	1,547	£10,476	£16.20
	Sainsbury's, Castle Lane West	4,263	70%	2,984	£11,691	£34.89
	Other Castlepoint	85	100%	85	£5,100	£0.44
	Sub-Total	**11,861**		**8,147**		**£105.24**
Charminster	Co-operative Food, Charminster Road	191	95%	181	£10,824	£1.96
	Tesco Express, Charminster Road	216	95%	205	£13,797	£2.83
	Other Charminster	677	100%	677	£5,100	£3.45
	Sub Total	**1,084**		**1,064**		**£8.25**
Holdenhurst Road	Aldi, Stewart Close	976	85%	830	£10,827	£8.98
	Co-operative Food, Holdenhurst Road	341	95%	324	£10,824	£3.51
	Tesco Express, Holdenhurst Road	271	95%	257	£13,797	£3.55
	Sub Total	**1,588**		**1,411**		**£16.04**
Kinson	Tesco Superstore, Wimborne Road, Kinson	2,132	85%	1,812	£13,797	£25.00
	Other Kinson	224	100%	224	£5,100	£1.14
	Sub-Total	**2,356**		**2,036**		**£26.15**
Southbourne	Co-operative Food, Belle Vue Road	333	95%	316	£10,824	£3.42
	Co-operative Food, Seabourne Road	234	95%	222	£10,824	£2.41
	Sainsbury's Local, Southbourne Grove	247	95%	235	£11,691	£2.74
	Tesco Express, Southbourne Grove	272	95%	258	£13,797	£3.57
	Other Southbourne	850	100%	850	£5,100	£4.34
	Sub-Total	**1,936**		**1,882**		**£16.47**
Wallisdown	Aldi, Wallisdown Road	870	85%	740	£10,827	£8.01
	Tesco Express, Wallisdown Road	208	95%	198	£13,797	£2.73
	Sub-Total	**1,078**		**937**		**£10.73**
Westbourne	Co-operative Food, Queens Road	233	95%	221	£10,824	£2.40
	Iceland, Poole Road	419	95%	398	£6,859	£2.73
	M&S Simply Food, Seamoor Road	998	95%	948	£10,476	£9.93
	Tesco Express, Poole Road	220	95%	209	£13,797	£2.88
	Other Westbourne	870	100%	870	£5,100	£4.44
	Sub Total	**2,740**		**2,646**		**£22.38**
Winton	Iceland, Wimborne Road	401	95%	381	£6,859	£2.61
	Lidl, Wimborne Road	903	85%	768	£10,103	£7.75
	Sainsbury's Local, Wimborne Road	206	95%	196	£11,691	£2.29
	Tesco Express, 704 Wimborne Road	168	95%	160	£13,797	£2.20
	Waitrose, Wimborne Road	1,424	90%	1,282	£12,940	£16.58
	Other Winton	996	100%	996	£5,100	£5.08
	Sub Total	**4,098**		**3,781**		**£36.52**
Other	Aldi, Mallard Retail Park	1,008	85%	857	£10,827	£9.28
	Co-operative Food, Columbia Road	159	95%	151	£10,824	£1.63
	Co-operative Food, Castle Lane	233	95%	221	£10,824	£2.40
	Co-operative Food, Christchurch Road	238	95%	226	£10,824	£2.45
	Co-operative Food, Cranleigh Road	92	95%	87	£10,824	£0.95
	Co-operative Food, King John Avenue (Bearwood)	438	95%	416	£10,824	£4.50
	Co-operative Food, Kinson Road	274	95%	260	£10,824	£2.82
	Co-operative Food, Tuckton Road (Tuckton)	179	95%	170	£10,824	£1.84
	Co-operative Food, Wimborne Road (Moordown)	169	95%	161	£10,824	£1.74
	Home Bargains, Ringwood Retail Park	1,029	25%	257	£7,000	£1.80
	Lidl, Ringwood Road, Bournemouth	736	85%	626	£10,103	£6.32
	McColls, Ringwood Road	85	95%	81	£5,100	£0.41
	Sainsbury's Local, Christchurch Road	144	95%	137	£11,690	£1.60
	Tesco Express, Christchurch Road	212	95%	201	£13,797	£2.78
	Tesco Express, Shillingstone Drive (Muscliffe)	140	95%	133	£13,797	£1.84
	Tesco Express, 1256 Wimborne Road	194	95%	184	£13,797	£2.54
	Tesco Extra, Riverside Avenue	6,263	60%	3,758	£13,797	£51.85
	Other	1,081	100%	1,081	£5,100	£5.51
	Sub Total	**12,674**		**9,008**		**£102.25**
TOTAL		**54,934**		**43,279**		**£471.23**

Source: *Bournemouth Council's Land Use Survey 2016 and ORC StorePoint 2018 and Global Data 2018*

Table 10 - Convenience Goods Floorspace and Benchmark Turnover in East Dorset and Christchurch

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Christchurch Town Centre	Waitrose, Bargates	2,292	90%	2,063	£12,940	£26.69
	Marks & Spencer Simply Food	923	95%	877	£10,476	£9.19
	Other Christchurch Town Centre	900	100%	900	£5,100	£4.59
	Sub-Total	**4,115**		**3,840**		**£40.47**
Highcliffe	Co-op, Lymington Road, Highcliffe	722	85%	614	£10,824	£6.64
	Tesco Express, Lymington Road, Highcliffe	232	95%	220	£13,797	£3.04
	Other Highcliffe	250	100%	250	£5,100	£1.28
	Sub-Total	**1,204**		**1,084**		**£10.96**
Christchurch Other	Sainsbury's, Lynhurst Road	5,264	75%	3,948	£11,691	£46.16
	Aldi, Meteor Retail Park, Somerford Road	1,003	85%	853	£10,827	£9.23
	Lidl, Somerford Road	915	85%	778	£10,103	£7.86
	Home Bargains, Christchurch Retail Park	835	25%	209	£7,000	£1.46
	Marks & Spencer BP, Somerford Road	84	95%	80	£10,476	£0.84
	Tesco Express, Barrack Road	116	95%	110	£13,797	£1.52
	Co-op, Fairmile Road	235	95%	223	£10,824	£2.42
	Local shops in Christchurch Borough	2,000	100%	2,000	£5,100	£10.20
	Sub Total	**10,452**		**8,200**		**£79.68**
CBC Total		**15,771**		**13,124**		**£131.11**
Ferndown	Iceland, Victoria Road	454	95%	431	£6,859	£2.96
	McColls, Somerford Road	69	95%	66	£5,100	£0.33
	McColls, Pinehurst Road	86	95%	82	£5,100	£0.42
	Tesco, Pennys Walk	3,293	75%	2,470	£13,797	£34.08
	Tesco Express, Glenmoor Road	133	95%	126	£13,797	£1.74
	Lidl, Ringwood Road	848	85%	721	£10,103	£7.28
	M&S Foodhall, Ringwood Road	903	95%	858	£10,476	£8.99
	Sainsbury's, Ringwood Road	4,101	70%	2,871	£11,691	£33.56
	Other Ferndown	350	100%	350	£5,100	£1.79
	Sub-Total	**10,237**		**7,974**		**£91.14**
Verwood	Co-op, Ringwood Road	333	95%	316	£10,824	£3.42
	Tesco Express, Ringwood Road	254	95%	241	£13,797	£3.33
	Morrisons, Chiltern Drive	3,225	85%	2,741	£12,656	£34.69
	Other Verwood	400	100%	400	£5,100	£2.04
	Sub-Total	**4,212**		**3,699**		**£43.49**
Wimborne	Co-op, Crown Mead	1,254	90%	1,129	£10,824	£12.22
	Co-op, Smugglers Lane	115	95%	109	£10,824	£1.18
	Co-op, Wimborne Road	333	95%	316	£10,824	£3.42
	Co-op, Station Road	166	95%	158	£10,824	£1.71
	Marks & Spencer BP, Leigh Road	84	95%	80	£10,476	£0.84
	McColls, High Street	241	95%	229	£5,100	£1.17
	Waitrose, Rowlands Hill	1,472	90%	1,325	£12,940	£17.14
	Other Wimborne	400	100%	400	£5,100	£2.04
	Sub-Total	**4,065**		**3,745**		**£39.72**
West Moors	Co-op, Station Road	212	95%	201	£10,824	£2.18
	Tesco Express, Station Road	254	95%	241	£13,797	£3.33
	McColls, Turbary Road	84	95%	80	£5,100	£0.41
	Other West Moors	100	100%	100	£5,100	£0.51
	Sub-Total	**650**		**623**		**£6.43**
Corfe Mullen	Co-op, The Parade, Wareham Road	921	90%	829	£10,824	£8.97
	Corfe Mullen Other	100	100%	100	£5,100	£0.51
	Sub Total	**921**		**829**		**£8.97**
West Parley	Tesco Express, New Road	273	95%	259	£13,797	£3.58
	West Parley Other	50	100%	50	£5,100	£0.26
	Sub Total	**273**		**259**		**£3.58**
EDC Total		**20,358**		**17,129**		**£193.32**

Source: *Christchurch & East Dorset Council's Land Use Survey November 2016 and ORC StorePoint 2018 and Global Data 2018*

Table 11 - Summary of Convenience Goods Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth	420.44	433.24	445.29	455.83
Christchurch	148.00	152.75	156.88	160.84
East Dorset (East)	134.73	138.21	141.35	144.30
East Dorset (West)	57.82	59.02	60.14	61.18
Total	**760.98**	**783.23**	**803.66**	**822.15**
Benchmark Turnover of Existing Facilities				
Bournemouth	471.23	481.69	483.61	483.61
Christchurch (1)	131.11	161.91	162.56	162.56
East Dorset East (2)	144.63	162.85	163.50	163.50
East Dorset West (3)	48.69	52.27	52.48	52.48
Total	**795.66**	**858.72**	**862.16**	**862.16**
Surplus/Deficit Expenditure £M				
Bournemouth	-50.80	-48.44	-38.32	-27.78
Christchurch	16.89	-9.16	-5.68	-1.72
East Dorset (East)	-9.90	-24.64	-22.15	-19.20
East Dorset (West)	9.13	6.75	7.66	8.70
Total	**-34.68**	**-75.48**	**-58.50**	**-40.00**

Source: Tables 5 to 10

(1) food store commitment at Beagle site added at 2023 - 2,230 sq.m net at £12,510 psm

(2) food store commitment at W.Parley added at 2023 - 1,200 sq.m net at £12,510 psm = £15.01 million

(3) North Wimborne commitment added at 2023 - 200 sq.m net at £12,510 psm = £2.5 million

Table 12 - Convenience Goods Floorspace Capacity up to 2033

	2017	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£12,239	£12,510	£12,561	£12,561
Floorspace Projection (sq.m net)				
Bournemouth	0	0	0	0
Christchurch	1,380	0	0	0
East Dorset (East)	0	0	0	0
East Dorset (West)	746	540	610	693
	2,126	**540**	**610**	**693**
Floorspace Projection (sq.m gross)				
Bournemouth	0	0	0	0
Christchurch	1,972	0	0	0
East Dorset (East)	0	0	0	0
East Dorset (West)	1,065	771	871	990
	3,037	**771**	**871**	**990**

Source: Table 11

Appendix 3: Comparison assessment

Table 1 - Study Area Population

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	78,558	81,613	84,347	86,478
Zone 2 - Bournemouth West	115,339	119,462	123,085	125,938
Zone 3 - E. Bournemouth/W. Christchurch	42,397	44,100	45,529	46,729
Zone 4 - Christchurch East/Highclffe	31,274	32,466	33,383	34,239
Zone 5 - Ferndown/Verwood	50,928	52,412	53,625	54,678
Zone 6 - Wimborne	37,764	38,750	39,561	40,250
Zone 7 - Poole East	87,749	89,780	91,347	92,682
Zone 8 - Poole West	48,656	49,746	50,609	51,327
Zone 9 - Purbeck	37,968	38,704	39,359	39,850
Zone 10 - North Dorset	31,777	32,405	32,961	33,382
Zone 11 - Ringwood/Fordingbridge	42,641	43,712	44,560	45,299
Zone 12 - New Forest	68,545	70,068	71,325	72,467
Total	**673,596**	**693,219**	**709,691**	**723,320**
Tourism (Staying/Day Trips)	43,000	43,000	43,000	43,000

Sources:

Experian 2017 Population (MMG3)
Office of National Statistics 2016 SNPP projections
Tourism in Dorset February 2016 (overnight and day visitors)

Table 2 - Comparison Goods Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	2,755	3,173	3,672	4,287
Zone 2 - Bournemouth West	2,880	3,317	3,838	4,481
Zone 3 - E. Bournemouth/W. Christchurch	2,885	3,323	3,844	4,489
Zone 4 - Christchurch East/Highclffe	3,029	3,489	4,036	4,713
Zone 5 - Ferndown/Verwood	3,360	3,870	4,478	5,228
Zone 6 - Wimborne	3,479	4,007	4,636	5,413
Zone 7 - Poole East	2,887	3,325	3,847	4,491
Zone 8 - Poole West	2,961	3,410	3,946	4,607
Zone 9 - Purbeck	3,184	3,668	4,243	4,955
Zone 10 - North Dorset	3,118	3,591	4,154	4,851
Zone 11 - Ringwood/Fordingbridge	4,138	4,766	5,515	6,439
Zone 12 - New Forest	4,141	4,769	5,518	6,443
Tourism	2,300	2,649	3,065	3,579

Sources:
Experian Local Expenditure 2017 (2017 prices)
Growth Rates: 2.8% 2017-2018, 2.6% 2018-2019, 2.8% 2019 to 2020, 3.3% p.a. from 2020 to 2025 and 3.2% from 2025
Excludes Special Forms of Trading
Tourism in Dorset February 2016 - average shopping spend = £9 per day of which 70% assumed for comparison goods

Table 3 - Total Comparison Goods Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	216.43	258.96	309.72	370.73
Zone 2 - Bournemouth West	332.18	396.26	472.40	564.33
Zone 3 - E. Bournemouth/W. Christchurch	122.32	146.54	175.01	209.77
Zone 4 - Christchurch East/Highclffe	94.73	113.27	134.73	161.37
Zone 5 - Ferndown/Verwood	171.12	202.83	240.13	285.86
Zone 6 - Wimborne	131.38	155.27	183.40	217.87
Zone 7 - Poole East	253.33	298.52	351.41	416.23
Zone 8 - Poole West	144.07	169.63	199.70	236.46
Zone 9 - Purbeck	120.89	141.97	167.00	197.46
Zone 10 - North Dorset	99.08	116.37	136.92	161.94
Zone 11 - Ringwood/Fordingbridge	176.45	208.33	245.75	291.68
Zone 12 - New Forest	283.84	334.15	393.57	466.90
Study Area Total	**2,145.81**	**2,542.11**	**3,009.76**	**3,580.60**
Tourism	98.90	113.90	131.79	153.88
Study Area Total	**2,244.71**	**2,656.01**	**3,141.55**	**3,734.48**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Comparison Goods Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	16.2%	17.6%	13.8%	8.9%	8.6%	10.5%	9.6%	5.0%	9.0%	6.3%	9.5%	4.6%	65.0%
Boscombe	6.0%	2.5%	3.9%	1.3%	0.4%	0.5%	0.3%	0.1%	0.0%	0.2%	1.0%	0.2%	0.0%
Castlepoint	41.5%	22.7%	25.7%	19.1%	38.5%	5.5%	9.3%	9.3%	2.4%	4.7%	14.4%	6.5%	0.0%
Charminster	0.1%	0.1%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kinson	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	0.2%	0.2%	1.7%	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Wallisdown	0.0%	0.5%	0.0%	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%
Westbourne	0.2%	1.2%	0.8%	0.1%	0.1%	0.0%	0.6%	0.1%	0.1%	0.0%	0.0%	0.2%	8.0%
Winton	2.3%	3.8%	0.2%	0.0%	0.5%	0.1%	0.3%	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%
Other Bournemouth	12.7%	8.7%	9.2%	6.9%	4.6%	1.2%	2.0%	2.5%	0.6%	1.6%	5.9%	4.0%	0.0%
Bournemouth Sub Total	**79.2%**	**58.4%**	**55.3%**	**37.0%**	**53.3%**	**17.9%**	**22.3%**	**17.4%**	**12.1%**	**12.8%**	**31.0%**	**15.6%**	**78.0%**
Christchurch													
Christchurch town centre	3.9%	0.8%	20.5%	34.4%	0.3%	0.0%	0.3%	0.7%	0.0%	0.0%	8.9%	5.5%	8.0%
Highcliffe	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.0%
Other Christhurch	1.2%	0.3%	11.3%	13.9%	0.4%	0.0%	0.1%	0.5%	0.0%	0.0%	3.4%	7.8%	0.0%
Christchurch Sub Total	**5.1%**	**1.1%**	**31.8%**	**48.9%**	**0.8%**	**0.0%**	**0.4%**	**1.2%**	**0.0%**	**0.0%**	**12.3%**	**13.4%**	**9.0%**
East Dorset													
Ferndown	0.5%	0.7%	0.7%	0.2%	14.4%	1.2%	0.2%	0.3%	0.1%	0.2%	0.3%	0.2%	0.0%
Verwood	0.0%	0.1%	0.0%	0.2%	4.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	2.0%
Wimborne	0.4%	1.0%	0.4%	0.2%	1.7%	20.8%	0.3%	2.4%	0.8%	2.1%	3.7%	0.0%	10.0%
West Moors	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Parley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other East Dorset	0.5%	2.3%	0.0%	0.2%	1.7%	0.8%	0.9%	0.4%	0.0%	0.0%	1.5%	0.1%	1.0%
East Dorset Sub Total	**1.4%**	**4.1%**	**1.1%**	**0.8%**	**22.6%**	**23.0%**	**1.4%**	**3.1%**	**0.9%**	**2.3%**	**6.0%**	**0.3%**	**13.0%**
Other													
New Forest District	0.4%	0.2%	0.5%	2.7%	4.3%	0.6%	0.7%	0.0%	0.0%	0.0%	21.7%	39.8%	n/a
North Dorset District	0.0%	0.0%	0.2%	0.0%	0.0%	0.5%	0.0%	0.1%	0.2%	37.3%	0.9%	0.0%	n/a
Poole	10.9%	32.5%	6.2%	2.1%	10.9%	51.5%	70.4%	74.6%	58.9%	39.4%	5.8%	2.1%	n/a
Purbeck District	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	15.5%	0.1%	0.0%	0.1%	n/a
Eslewhere	3.0%	3.5%	4.9%	8.5%	8.1%	6.5%	4.8%	3.5%	12.4%	8.1%	22.3%	28.7%	n/a
Other Sub Total	**14.3%**	**36.4%**	**11.8%**	**13.3%**	**23.3%**	**59.1%**	**75.9%**	**78.3%**	**87.0%**	**84.9%**	**50.7%**	**70.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2017 (weighted results)

Table 5 - Base Year 2017 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**216.43**	**332.18**	**122.32**	**94.73**	**171.12**	**131.38**	**253.33**	**144.07**	**120.89**	**99.08**	**176.45**	**283.84**	**98.90**	**2,244.71**
Bournemouth														
Bournemouth town centre	35.06	58.46	16.88	8.43	14.72	13.80	24.32	7.20	10.88	6.24	16.76	13.06	64.29	290.10
Boscombe	12.99	8.30	4.77	1.23	0.68	0.66	0.76	0.14	0.00	0.20	1.76	0.57	0.00	32.07
Castlepoint	89.82	75.40	31.44	18.09	65.88	7.23	23.56	13.40	2.90	4.66	25.41	18.45	0.00	376.23
Charminster	0.22	0.33	0.00	0.38	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.10
Kinson	0.00	3.65	0.00	0.00	0.00	0.00	0.51	0.00	0.00	0.00	0.00	0.00	0.00	4.16
Southbourne	0.43	0.66	2.08	0.19	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.95	9.00
Wallisdown	0.00	1.66	0.00	0.09	0.17	0.13	0.00	0.14	0.00	0.00	0.35	0.00	0.00	2.56
Westbourne	0.43	3.99	0.98	0.09	0.17	0.00	1.52	0.14	0.12	0.00	0.00	0.57	7.91	15.93
Winton	4.98	12.62	0.24	0.00	0.86	0.13	0.76	0.43	0.00	0.00	0.00	0.28	0.00	20.31
Other Bournemouth	27.49	28.90	11.25	6.54	7.87	1.58	5.07	3.60	0.73	1.59	10.41	11.35	0.00	116.37
Bournemouth Sub Total	**171.41**	**193.99**	**67.64**	**35.05**	**91.21**	**23.52**	**56.49**	**25.07**	**14.63**	**12.68**	**54.70**	**44.28**	**77.14**	**867.81**
Christchurch														
Christchurch town centre	8.44	2.66	25.07	32.59	0.51	0.00	0.76	1.01	0.00	0.00	15.70	15.61	7.91	110.27
Highcliffe	0.00	0.00	0.00	0.57	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.99	2.01
Other Christhurch	2.60	1.00	13.82	13.17	0.68	0.00	0.25	0.72	0.00	0.00	6.00	22.14	0.00	60.38
Christchurch Sub Total	**11.04**	**3.65**	**38.90**	**46.32**	**1.37**	**0.00**	**1.01**	**1.73**	**0.00**	**0.00**	**21.70**	**38.04**	**8.90**	**172.66**
East Dorset														
Ferndown	1.08	2.33	0.86	0.19	24.64	1.58	0.51	0.43	0.12	0.20	0.53	0.57	0.00	33.03
Verwood	0.00	0.33	0.00	0.19	7.19	0.13	0.00	0.00	0.00	0.00	0.88	0.00	1.98	10.70
Wimborne	0.87	3.32	0.49	0.19	2.91	27.33	0.76	3.46	0.97	2.08	6.53	0.00	9.89	58.79
West Moors	0.00	0.00	0.00	0.00	1.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.03
Corfe Mullen	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
West Parley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other East Dorset	1.08	7.64	0.00	0.19	2.91	1.05	2.28	0.58	0.00	0.00	2.65	0.28	0.99	19.65
East Dorset Sub Total	**3.03**	**13.62**	**1.35**	**0.76**	**38.67**	**30.22**	**3.55**	**4.47**	**1.09**	**2.28**	**10.59**	**0.85**	**12.86**	**123.32**
Other														
New Forest District	0.87	0.66	0.61	2.56	7.36	0.79	1.77	0.00	0.00	0.00	38.29	112.97	n/a	165.88
North Dorset District	0.00	0.00	0.24	0.00	0.00	0.66	0.00	0.14	0.24	36.96	1.59	0.00	n/a	39.83
Poole	23.59	107.96	7.58	1.99	18.65	67.66	178.35	107.48	71.20	39.04	10.23	5.96	n/a	639.69
Purbeck District	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.14	18.74	0.10	0.00	0.28	n/a	19.93
Eslewhere	6.49	11.63	5.99	8.05	13.86	8.54	12.16	5.04	14.99	8.03	39.35	81.46	n/a	215.59
Other Sub Total	**30.95**	**120.91**	**14.43**	**12.60**	**39.87**	**77.65**	**192.28**	**112.81**	**105.17**	**84.12**	**89.46**	**200.68**		**1,080.93**
TOTAL	**216.43**	**332.18**	**122.32**	**94.73**	**171.12**	**131.38**	**253.33**	**144.07**	**120.89**	**99.08**	**176.45**	**283.84**		**2,244.71**

Source: Tables 3 and 4

Table 6 - Future 2023 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**258.96**	**396.26**	**146.54**	**113.27**	**202.83**	**155.27**	**298.52**	**169.63**	**141.97**	**116.37**	**208.33**	**334.15**	**113.90**	**2,656.01**
Bournemouth town centre	41.95	69.74	20.22	10.08	17.44	16.30	28.66	8.48	12.78	7.33	19.79	15.37	74.03	342.19
Boscombe	15.54	9.91	5.72	1.47	0.81	0.78	0.90	0.17	0.00	0.23	2.08	0.67	0.00	38.27
Castlepoint	107.47	89.95	37.66	21.64	78.09	8.54	27.76	15.78	3.41	5.47	30.00	21.72	0.00	447.48
Other Bournemouth	40.14	61.82	17.44	8.72	11.76	2.17	9.25	5.09	0.99	1.86	12.71	14.37	14.81	201.14
Bournemouth Sub Total	**205.09**	**231.41**	**81.04**	**41.91**	**108.11**	**27.79**	**66.57**	**29.52**	**17.18**	**14.89**	**64.58**	**52.13**	**88.84**	**1,029.07**
Christchurch	13.21	4.36	46.60	55.39	1.62	0.00	1.19	2.04	0.00	0.00	25.62	44.78	10.25	205.06
East Dorset - East	2.59	12.28	1.03	0.68	42.39	3.26	3.28	1.19	0.14	0.23	4.79	1.00	3.42	76.29
East Dorset - West	1.04	3.96	0.59	0.23	3.45	32.45	0.90	4.07	1.14	2.44	7.71	0.00	11.39	69.36
Other	37.03	144.24	17.29	15.07	47.26	91.77	226.58	132.82	123.51	98.80	105.62	236.25	n/a	1,276.23
TOTAL	**258.96**	**396.26**	**146.54**	**113.27**	**202.83**	**155.27**	**298.52**	**169.63**	**141.97**	**116.37**	**208.33**	**334.15**	**113.90**	**2,656.01**

Source: Tables 3 and 4

Table 7 - 2028 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**309.72**	**472.40**	**175.01**	**134.73**	**240.13**	**183.40**	**351.41**	**199.70**	**167.00**	**136.92**	**245.75**	**393.57**	**131.79**	**3,141.55**
Bournemouth town centre	50.17	83.14	24.15	11.99	20.65	19.26	33.74	9.99	15.03	8.63	23.35	18.10	85.66	403.86
Boscombe	18.58	11.81	6.83	1.75	0.96	0.92	1.05	0.20	0.00	0.27	2.46	0.79	0.00	45.62
Castlepoint	128.53	107.23	44.98	25.73	92.45	10.09	32.68	18.57	4.01	6.44	35.39	25.58	0.00	531.69
Other Bournemouth	48.01	73.69	20.83	10.37	13.93	2.57	10.89	5.99	1.17	2.19	14.99	16.92	17.13	238.69
Bournemouth Sub Total	**245.30**	**275.88**	**96.78**	**49.85**	**127.99**	**32.83**	**78.36**	**34.75**	**20.21**	**17.53**	**76.18**	**61.40**	**102.79**	**1,219.85**
Christchurch	15.80	5.20	55.65	65.88	1.92	0.00	1.41	2.40	0.00	0.00	30.23	52.74	11.86	243.08
East Dorset - East	3.10	14.64	1.23	0.81	50.19	3.85	3.87	1.40	0.17	0.27	5.65	1.18	3.95	90.31
East Dorset - West	1.24	4.72	0.70	0.27	4.08	38.33	1.05	4.79	1.34	2.88	9.09	0.00	13.18	81.68
Other	44.29	171.95	20.65	17.92	55.95	108.39	266.72	156.37	145.29	116.25	124.59	278.25	n/a	1,506.63
TOTAL	**309.72**	**472.40**	**175.01**	**134.73**	**240.13**	**183.40**	**351.41**	**199.70**	**167.00**	**136.92**	**245.75**	**393.57**	**131.79**	**3,141.55**

Source: Tables 3 and 4

Table 8 - 2033 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**370.73**	**564.33**	**209.77**	**161.37**	**285.86**	**217.87**	**416.23**	**236.46**	**197.46**	**161.94**	**291.68**	**466.90**	**153.88**	**3,734.48**
Bournemouth town centre	60.06	99.32	28.95	14.36	24.58	22.88	39.96	11.82	17.77	10.20	27.71	21.48	100.02	479.11
Boscombe	22.24	14.11	8.18	2.10	1.14	1.09	1.25	0.24	0.00	0.32	2.92	0.93	0.00	54.52
Castlepoint	153.85	128.10	53.91	30.82	110.05	11.98	38.71	21.99	4.74	7.61	42.00	30.35	0.00	634.13
Other Bournemouth	57.46	88.04	24.96	12.43	16.58	3.05	12.90	7.09	1.38	2.59	17.79	20.08	20.00	284.36
Bournemouth Sub Total	**293.62**	**329.57**	**116.00**	**59.71**	**152.36**	**39.00**	**92.82**	**41.14**	**23.89**	**20.73**	**90.42**	**72.84**	**120.03**	**1,452.12**
Christchurch	18.91	6.21	66.71	78.91	2.29	0.00	1.66	2.84	0.00	0.00	35.88	62.57	13.85	289.81
East Dorset - East	3.71	17.49	1.47	0.97	59.74	4.58	4.58	1.66	0.20	0.32	6.71	1.40	4.62	107.44
East Dorset - West	1.48	5.64	0.84	0.32	4.86	45.54	1.25	5.68	1.58	3.40	10.79	0.00	15.39	96.77
Other	53.01	205.42	24.75	21.46	66.60	128.76	315.92	185.15	171.79	137.48	147.88	330.10	n/a	1,788.34
TOTAL	**370.73**	**564.33**	**209.77**	**161.37**	**285.86**	**217.87**	**416.23**	**236.46**	**197.46**	**161.94**	**291.68**	**466.90**	**153.88**	**3,734.48**

Source: Tables 3 and 4

Table 9 - Summary of Comparison Goods Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth town centre	290.10	342.19	403.86	479.11
Boscombe	32.07	38.27	45.62	54.52
Castlepoint	376.23	447.48	531.69	634.13
Other Bournemouth	169.41	201.14	238.69	284.36
Christchurch	172.66	205.06	243.08	289.81
East Dorset - East	64.40	76.29	90.31	107.44
East Dorset - West	58.92	69.36	81.68	96.77
Total	**1,163.79**	**1,379.78**	**1,634.92**	**1,946.14**
Benchmark Turnover of Existing Facilities				
Bournemouth town centre	290.10	339.69	386.20	432.70
Boscombe	32.07	37.55	42.69	47.83
Castlepoint	376.23	440.55	500.87	561.18
Other Bournemouth	169.41	198.37	225.54	252.69
Christchurch (1)	172.66	206.09	234.31	262.52
East Dorset - East (2) (3)	64.40	83.76	95.23	106.69
East Dorset - West (4)	58.92	70.40	80.04	89.68
Total	**1,163.79**	**1,376.41**	**1,564.87**	**1,753.30**
Surplus Expenditure (£m)				
Bournemouth town centre	0.00	2.50	17.66	46.41
Boscombe	0.00	0.72	2.93	6.69
Castlepoint	0.00	6.93	30.82	72.94
Other Bournemouth	0.00	2.76	13.15	31.67
Christchurch	0.00	-1.03	8.77	27.29
East Dorset - East	0.00	-7.47	-4.92	0.74
East Dorset - West	0.00	-1.04	1.64	7.09
Total	**0.00**	**3.37**	**70.05**	**192.84**

Source: Tables 5 to 8

(1) food store comparison sales at Beagle site added at 2023 - 557 sq.m net at £7,026 psm

(2) Sainsbury's extension at Ferndown added at 2023 - 689 sq.m net at £7,026 psm

(3) commitment at W.Parley added at 2023 - 500 sq.m net at £7,026 psm

(4) North Wimborne commitment added at 2023 - 200 sq.m net at £7,026 psm

Table 10 - Bournemouth Comparison Goods Floorspace Capacity up to 2033

	2017	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£6,000	£7,026	£7,988	£8,950
Floorspace Projection (sq.m net)				
Bournemouth town centre	0	356	2,211	5,186
Boscombe	0	102	367	748
Castlepoint	0	986	3,858	8,151
Other Bournemouth	0	393	1,647	3,538
Sub-Total	**0**	**1,838**	**8,082**	**17,622**
Christchurch	**0**	**0**	**1,099**	**3,049**
East Dorset - East	0	0	0	83
East Dorset - West	0	0	205	792
Sub-Total	**0**	**0**	**205**	**875**
Total	**0**	**1,838**	**9,385**	**21,547**
Floorspace Projection (sq.m gross)				
Bournemouth town centre	0	474	2,948	6,914
Boscombe	0	136	489	997
Castlepoint	0	1,315	5,144	10,868
Other Bournemouth	0	524	2,196	4,718
Sub-Total	**0**	**2,450**	**10,776**	**23,497**
Christchurch	**0**	**0**	**1,465**	**4,066**
East Dorset - East	0	0	0	111
East Dorset - West	0	0	273	1,056
Sub-Total	**0**	**0**	**273**	**1,167**
Total	**0**	**2,450**	**12,514**	**28,730**

Source: Table 9

Appendix 4: Food/beverage assessment

Table 1 - Study Area Population

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	78,558	81,613	84,347	86,478
Zone 2 - Bournemouth West	115,339	119,462	123,085	125,938
Zone 3 - E. Bournemouth/W. Christchurch	42,397	44,100	45,529	46,729
Zone 4 - Christchurch East/Highclffe	31,274	32,466	33,383	34,239
Zone 5 - Ferndown/Verwood	50,928	52,412	53,625	54,678
Zone 6 - Wimborne	37,764	38,750	39,561	40,250
Zone 7 - Poole East	87,749	89,780	91,347	92,682
Zone 8 - Poole West	48,656	49,746	50,609	51,327
Zone 9 - Purbeck	37,968	38,704	39,359	39,850
Zone 10 - North Dorset	31,777	32,405	32,961	33,382
Zone 11 - Ringwood/Fordingbridge	42,641	43,712	44,560	45,299
Zone 12 - New Forest	68,545	70,068	71,325	72,467
Total	**673,596**	**693,219**	**709,691**	**723,320**
Tourism (Staying/Day Trips)	43,000	43,000	43,000	43,000

Sources:
Experian 2017 Population (MMG3)
Office of National Statistics 2016 SNPP projections
Tourism in Dorset February 2016 (overnight and day visitors)

Table 2 - Food and Beverage Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	1,212	1,301	1,381	1,465
Zone 2 - Bournemouth West	1,186	1,273	1,351	1,434
Zone 3 - E. Bournemouth/W. Christchurch	1,221	1,310	1,391	1,476
Zone 4 - Christchurch East/Highclffe	1,164	1,249	1,326	1,407
Zone 5 - Ferndown/Verwood	1,202	1,290	1,369	1,453
Zone 6 - Wimborne	1,247	1,338	1,420	1,508
Zone 7 - Poole East	1,170	1,256	1,333	1,415
Zone 8 - Poole West	1,117	1,199	1,272	1,351
Zone 9 - Purbeck	1,171	1,257	1,334	1,416
Zone 10 - North Dorset	1,093	1,173	1,245	1,322
Zone 11 - Ringwood/Fordingbridge	1,368	1,468	1,558	1,654
Zone 12 - New Forest	1,429	1,534	1,628	1,728
Tourism	5,292	5,681	6,029	6,399

Sources:
Experian Local Expenditure 2017 (2017 prices)
Growth Rates: 1.3% 2017-2019, 1% in 2020 and 1.2% p.a. from 2021
Tourism in Dorset February 2016 - average shopping spend = £14.50 per day

Table 3 - Total Food and Beverage Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	95.21	106.18	116.48	126.69
Zone 2 - Bournemouth West	136.79	152.07	166.29	180.60
Zone 3 - E. Bournemouth/W. Christchurch	51.77	57.77	63.33	68.97
Zone 4 - Christchurch East/Highclffe	36.40	40.55	44.27	48.17
Zone 5 - Ferndown/Verwood	61.22	67.61	73.41	79.45
Zone 6 - Wimborne	47.09	51.85	56.18	60.70
Zone 7 - Poole East	102.67	112.76	121.77	131.15
Zone 8 - Poole West	54.35	59.65	64.37	69.34
Zone 9 - Purbeck	44.46	48.65	52.50	56.43
Zone 10 - North Dorset	34.73	38.01	41.04	44.13
Zone 11 - Ringwood/Fordingbridge	58.33	64.17	69.42	74.93
Zone 12 - New Forest	97.95	107.48	116.12	125.22
Study Area Total	**820.97**	**906.76**	**985.18**	**1,065.77**
Tourism	227.56	244.28	259.25	275.17
Study Area Total	**1,048.53**	**1,151.04**	**1,244.42**	**1,340.94**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Food and Beverage Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	36.8%	30.3%	30.0%	5.2%	9.4%	3.2%	24.1%	4.8%	11.9%	1.0%	7.6%	7.8%	64.0%
Boscombe	5.2%	2.6%	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Castlepoint	7.4%	0.4%	0.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Charminster	6.0%	5.6%	0.9%	0.7%	1.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Kinson	0.2%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	4.3%	0.2%	8.8%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Wallisdown	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Westbourne	1.6%	13.7%	0.9%	0.0%	0.8%	1.8%	7.8%	0.0%	1.2%	0.0%	0.0%	0.0%	10.0%
Winton	2.7%	5.1%	0.3%	2.0%	1.6%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Other Bournemouth	1.3%	0.3%	3.0%	0.0%	0.2%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%
Bournemouth Sub Total	**65.5%**	**66.3%**	**44.8%**	**8.5%**	**14.6%**	**5.0%**	**33.6%**	**5.2%**	**14.0%**	**2.3%**	**8.5%**	**7.8%**	**78.0%**
Christchurch													
Christchurch town centre	7.6%	2.4%	44.3%	52.1%	4.8%	0.3%	1.0%	0.0%	0.0%	0.0%	15.0%	10.9%	8.0%
Highcliffe	0.0%	0.4%	1.2%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Other Christhurch	0.7%	0.0%	2.4%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.0%	1.0%
Christchurch Sub Total	**8.3%**	**2.8%**	**47.9%**	**66.3%**	**4.8%**	**0.3%**	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**15.8%**	**14.4%**	**9.0%**
East Dorset													
Ferndown	0.5%	2.8%	0.3%	0.0%	14.8%	4.3%	0.2%	0.3%	0.0%	0.3%	1.3%	0.0%	0.0%
Verwood	0.0%	0.4%	0.0%	0.0%	15.9%	0.6%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	2.0%
Wimborne	0.2%	3.7%	0.0%	0.0%	9.4%	67.3%	2.5%	16.4%	1.9%	7.4%	3.1%	0.0%	10.0%
West Moors	0.0%	0.7%	0.0%	0.0%	2.9%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.1%	0.0%	0.0%	0.3%	2.2%	0.0%	1.5%	0.0%	8.5%	0.0%	0.0%	0.0%
West Parley	0.8%	0.4%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other East Dorset	0.2%	0.4%	0.0%	0.0%	2.8%	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
East Dorset Sub Total	**1.7%**	**8.5%**	**0.3%**	**0.0%**	**46.4%**	**74.6%**	**3.3%**	**19.2%**	**1.9%**	**16.2%**	**6.3%**	**0.0%**	**13.0%**
Other													
New Forest District	3.8%	1.0%	2.2%	6.5%	23.2%	6.2%	0.5%	0.0%	0.0%	1.0%	49.7%	42.7%	n/a
North Dorset District	0.0%	1.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.8%	43.4%	1.6%	0.0%	n/a
Poole	15.0%	17.4%	0.0%	1.1%	2.4%	9.8%	55.6%	69.0%	17.3%	9.5%	1.9%	4.1%	n/a
Purbeck District	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.3%	22.6%	1.3%	0.0%	0.0%	n/a
Eslewhere	4.8%	2.9%	4.8%	17.6%	8.6%	3.8%	5.3%	5.3%	43.4%	26.3%	16.2%	31.0%	n/a
Other Sub Total	**24.5%**	**22.4%**	**7.0%**	**25.2%**	**34.2%**	**20.1%**	**62.1%**	**75.6%**	**84.1%**	**81.5%**	**69.4%**	**77.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2017 (weighted results) and Tourism in Dorset February 2016 inc. Lichfields' Estimates

Table 5 - Base Year 2017 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**95.21**	**136.79**	**51.77**	**36.40**	**61.22**	**47.09**	**102.67**	**54.35**	**44.46**	**34.73**	**58.33**	**97.95**	**227.56**	**1,048.53**
Bournemouth														
Bournemouth town centre	35.04	41.45	15.53	1.89	5.75	1.51	24.74	2.61	5.29	0.35	4.43	7.64	145.64	291.87
Boscombe	4.95	3.56	0.00	0.22	0.00	0.00	0.51	0.00	0.00	0.00	0.52	0.00	0.00	9.76
Castlepoint	7.05	0.55	0.47	0.00	0.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.04
Charminster	5.71	7.66	0.47	0.25	0.61	0.00	0.00	0.00	0.40	0.00	0.00	0.00	0.00	15.11
Kinson	0.19	6.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.35
Southbourne	4.09	0.27	4.56	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	6.83	16.47
Wallisdown	0.00	4.92	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	5.03
Westbourne	1.52	18.74	0.47	0.00	0.49	0.85	8.01	0.00	0.53	0.00	0.00	0.00	22.76	53.36
Winton	2.57	6.98	0.16	0.73	0.98	0.00	0.00	0.00	0.00	0.45	0.00	0.00	0.00	11.86
Other Bournemouth	1.24	0.41	1.55	0.00	0.12	0.00	0.51	0.11	0.00	0.00	0.00	0.00	2.28	6.22
Bournemouth Sub Total	**62.36**	**90.69**	**23.19**	**3.09**	**8.94**	**2.35**	**34.50**	**2.83**	**6.22**	**0.80**	**4.96**	**7.64**	**177.49**	**425.07**
Christchurch														
Christchurch town centre	7.24	3.28	22.93	18.97	2.94	0.14	1.03	0.00	0.00	0.00	8.75	10.68	18.20	94.16
Highcliffe	0.00	0.55	0.62	3.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.45	0.00	6.86
Other Christhurch	0.67	0.00	1.24	1.93	0.00	0.00	0.00	0.00	0.00	0.00	0.47	0.98	2.28	7.56
Christchurch Sub Total	**7.90**	**3.83**	**24.80**	**24.14**	**2.94**	**0.14**	**1.03**	**0.00**	**0.00**	**0.00**	**9.22**	**14.10**	**20.48**	**108.57**
East Dorset														
Ferndown	0.48	3.83	0.16	0.00	9.06	2.02	0.21	0.16	0.00	0.10	0.76	0.00	0.00	16.78
Verwood	0.00	0.55	0.00	0.00	9.73	0.28	0.00	0.00	0.00	0.00	1.11	0.00	4.55	16.22
Wimborne	0.19	5.06	0.00	0.00	5.75	31.69	2.57	8.91	0.84	2.57	1.81	0.00	22.76	82.16
West Moors	0.00	0.96	0.00	0.00	1.78	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.00	3.28
Corfe Mullen	0.00	0.14	0.00	0.00	0.18	1.04	0.00	0.82	0.00	2.95	0.00	0.00	0.00	5.12
West Parley	0.76	0.55	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.49
Other East Dorset	0.19	0.55	0.00	0.00	1.71	0.09	0.62	0.00	0.00	0.00	0.00	0.00	2.28	5.44
East Dorset Sub Total	**1.62**	**11.63**	**0.16**	**0.00**	**28.40**	**35.13**	**3.39**	**10.43**	**0.84**	**5.63**	**3.67**	**0.00**	**29.58**	**130.49**
Other														
New Forest District	3.62	1.37	1.14	2.37	14.20	2.92	0.51	0.00	0.00	0.35	28.99	41.82	n/a	97.29
North Dorset District	0.00	1.50	0.00	0.00	0.00	0.14	0.00	0.00	0.36	15.07	0.93	0.00	n/a	18.01
Poole	14.28	23.80	0.00	0.40	1.47	4.61	57.08	37.50	7.69	3.30	1.11	4.02	n/a	155.27
Purbeck District	0.86	0.00	0.00	0.00	0.00	0.00	0.72	0.71	10.05	0.45	0.00	0.00	n/a	12.78
Eslewhere	4.57	3.97	2.48	6.41	5.26	1.79	5.44	2.88	19.30	9.13	9.45	30.36	n/a	101.05
Other Sub Total	**23.33**	**30.64**	**3.62**	**9.17**	**20.94**	**9.47**	**63.76**	**41.09**	**37.39**	**28.31**	**40.48**	**76.21**		**384.40**
TOTAL	**95.21**	**136.79**	**51.77**	**36.40**	**61.22**	**47.09**	**102.67**	**54.35**	**44.46**	**34.73**	**58.33**	**97.95**	**227.56**	**1,048.53**

Source: Tables 3 and 4

Table 6 - Future Food and Beverage Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth town centre	38.5%	31.8%	31.5%	5.5%	9.8%	3.3%	25.3%	4.8%	11.9%	1.0%	7.6%	7.8%	64.0%
Boscombe	5.1%	2.5%	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Castlepoint	7.2%	0.4%	0.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Bournemouth	15.3%	32.4%	13.9%	2.7%	3.6%	1.8%	9.0%	0.4%	2.1%	1.3%	0.0%	0.0%	14.0%
Christchurch	8.2%	2.8%	46.4%	66.0%	4.8%	0.3%	1.0%	0.0%	0.0%	0.0%	15.8%	14.4%	9.0%
East Dorset - East	1.5%	4.6%	0.3%	0.0%	36.3%	5.1%	0.8%	1.3%	0.0%	0.3%	3.2%	0.0%	3.0%
East Dorset - West	0.2%	3.7%	0.0%	0.0%	9.7%	69.4%	2.5%	17.9%	1.9%	15.9%	3.1%	0.0%	10.0%
Other	24.0%	21.8%	7.0%	25.2%	34.2%	20.1%	60.9%	75.6%	84.1%	81.5%	69.4%	77.8%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: Table 4 with Lichfields' adjustments - to reflect implementation of Bournemouth town centre cinema/food and beverage development

Table 7 - Future 2023 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**106.18**	**152.07**	**57.77**	**40.55**	**67.61**	**51.85**	**112.76**	**59.65**	**48.65**	**38.01**	**64.17**	**107.48**	**244.28**	**1,151.04**
Bournemouth town centre	40.88	48.36	18.20	2.23	6.63	1.71	28.53	2.86	5.79	0.38	4.88	8.38	156.34	325.16
Boscombe	5.42	3.80	0.00	0.24	0.00	0.00	0.56	0.00	0.00	0.00	0.58	0.00	0.00	10.60
Castlepoint	7.64	0.61	0.52	0.00	1.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.85
Other Bournemouth	16.25	49.27	8.03	1.09	2.43	0.93	10.15	0.24	1.02	0.49	0.00	0.00	34.20	124.11
Christchurch	8.71	4.26	26.81	26.76	3.25	0.16	1.13	0.00	0.00	0.00	10.14	15.48	21.98	118.66
East Dorset - East	1.59	7.00	0.17	0.00	24.54	2.64	0.90	0.78	0.00	0.11	2.05	0.00	7.33	47.12
East Dorset - West	0.21	5.63	0.00	0.00	6.56	35.98	2.82	10.68	0.92	6.04	1.99	0.00	24.43	95.26
Other	25.48	33.15	4.04	10.22	23.12	10.42	68.67	45.09	40.92	30.98	44.53	83.62		420.26
TOTAL	**106.18**	**152.07**	**57.77**	**40.55**	**67.61**	**51.85**	**112.76**	**59.65**	**48.65**	**38.01**	**64.17**	**107.48**	**244.28**	**1,151.04**

Source: Tables 3 and 6

Table 8 - Future 2028 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**116.48**	**166.29**	**63.33**	**44.27**	**73.41**	**56.18**	**121.77**	**64.37**	**52.50**	**41.04**	**69.42**	**116.12**	**259.25**	**1,244.42**
Bournemouth town centre	44.85	52.88	19.95	2.43	7.19	1.85	30.81	3.09	6.25	0.41	5.28	9.06	165.92	349.96
Boscombe	5.94	4.16	0.00	0.27	0.00	0.00	0.61	0.00	0.00	0.00	0.62	0.00	0.00	11.60
Castlepoint	8.39	0.67	0.57	0.00	1.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.80
Other Bournemouth	17.82	53.88	8.80	1.20	2.64	1.01	10.96	0.26	1.10	0.53	0.00	0.00	36.29	134.50
Christchurch	9.55	4.66	29.39	29.22	3.52	0.17	1.22	0.00	0.00	0.00	10.97	16.72	23.33	128.74
East Dorset - East	1.75	7.65	0.19	0.00	26.65	2.86	0.97	0.84	0.00	0.12	2.22	0.00	7.78	51.03
East Dorset - West	0.23	6.15	0.00	0.00	7.12	38.99	3.04	11.52	1.00	6.52	2.15	0.00	25.92	102.66
Other	27.96	36.25	4.43	11.15	25.11	11.29	74.16	48.67	44.16	33.44	48.18	90.34		455.14
TOTAL	**116.48**	**166.29**	**63.33**	**44.27**	**73.41**	**56.18**	**121.77**	**64.37**	**52.50**	**41.04**	**69.42**	**116.12**	**259.25**	**1,244.42**

Source: Tables 3 and 6

Table 9 - Future 2033 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**126.69**	**180.60**	**68.97**	**48.17**	**79.45**	**60.70**	**131.15**	**69.34**	**56.43**	**44.13**	**74.93**	**125.22**	**275.17**	**1,340.94**
Bournemouth town centre	48.78	57.43	21.73	2.65	7.79	2.00	33.18	3.33	6.71	0.44	5.69	9.77	176.11	375.60
Boscombe	6.46	4.51	0.00	0.29	0.00	0.00	0.66	0.00	0.00	0.00	0.67	0.00	0.00	12.60
Castlepoint	9.12	0.72	0.62	0.00	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.74
Other Bournemouth	19.38	58.51	9.59	1.30	2.86	1.09	11.80	0.28	1.18	0.57	0.00	0.00	38.52	145.10
Christchurch	10.39	5.06	32.00	31.80	3.81	0.18	1.31	0.00	0.00	0.00	11.84	18.03	24.77	139.19
East Dorset - East	1.90	8.31	0.21	0.00	28.84	3.10	1.05	0.90	0.00	0.13	2.40	0.00	8.26	55.09
East Dorset - West	0.25	6.68	0.00	0.00	7.71	42.12	3.28	12.41	1.07	7.02	2.32	0.00	27.52	110.38
Other	30.41	39.37	4.83	12.14	27.17	12.20	79.87	52.42	47.46	35.97	52.00	97.42		491.25
TOTAL	**126.69**	**180.60**	**68.97**	**48.17**	**79.45**	**60.70**	**131.15**	**69.34**	**56.43**	**44.13**	**74.93**	**125.22**	**275.17**	**1,340.94**

Source: Tables 3 and 6

Table 10 - Summary of Food and Beverage Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth town centre	291.87	325.16	349.96	375.60
Boscombe	9.76	10.60	11.60	12.60
Castlepoint	9.04	9.85	10.80	11.74
Other Bournemouth	114.40	124.11	134.50	145.10
Christchurch	108.57	118.66	128.74	139.19
East Dorset - East	43.21	47.12	51.03	55.09
East Dorset - West	87.28	95.26	102.66	110.38
Total	**664.13**	**730.78**	**789.29**	**849.69**
Benchmark Turnover of Existing Facilities				
Bournemouth town centre (1)	291.87	338.48	355.75	373.90
Boscombe	9.76	10.37	10.89	11.45
Castlepoint	9.04	9.59	10.08	10.60
Other Bournemouth	114.40	121.44	127.63	134.14
Christchurch	108.57	115.25	121.13	127.31
East Dorset - East	43.21	45.86	48.20	50.66
East Dorset - West	87.28	92.65	97.38	102.34
Total	**664.13**	**733.65**	**771.07**	**810.41**

(1) Food & Beverage untis in cinema development added at 2023 - 5,399 sq.m gross @ £5,308 psm

Source: Table 4 with Lichfields' adjustments - to reflect implementation of Bournemouth town centre cinema/food and beverage development

Table 11: Food and Beverage Floorspace Capacity up to 2033

	2017	2023	2028	2033
Surplus/Deficit Expenditure (£m)				
Bournemouth town centre	0.00	-13.32	-5.79	1.71
Boscombe	0.00	0.24	0.70	1.15
Castlepoint	0.00	0.26	0.71	1.14
Other Bournemouth	0.00	2.67	6.86	10.96
Sub-Total	**0.00**	**-10.15**	**2.49**	**14.95**
Christchurch	**0.00**	**3.41**	**7.61**	**11.88**
East Dorset - East	0.00	1.26	2.83	4.42
East Dorset - West	0.00	2.61	5.28	8.04
Sub-Total	**0.00**	**3.87**	**8.11**	**12.46**
TOTAL	**0.00**	**-2.87**	**18.22**	**39.29**
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,308	£5,578	£5,863
Floorspace Projection (sq.m gross)				
Bournemouth town centre	0	0	0	291
Boscombe	0	45	126	195
Castlepoint	0	49	128	194
Other Bournemouth	0	504	1,231	1,869
Sub-Total	**0**	**597**	**1,484**	**2,549**
Christchurch	**0**	**643**	**1,364**	**2,026**
East Dorset - East	0	237	507	754
East Dorset - West	0	492	947	1,371
Sub-Total	**0**	**729**	**1,454**	**2,126**
TOTAL	**0**	**1,969**	**4,303**	**6,701**