



Poole and Purbeck Town Centres, Retail and Leisure Study

Final Report

On behalf of **Borough of Poole Council** and **Purbeck District Council**

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Contents

1	Introduction	6
1.1	Study aim.....	6
1.2	Report structure.....	6
2	Policy review.....	7
2.2	Current planning policy framework.....	7
2.3	National Planning Practice Guidance (2014)	9
2.4	Changes to permitted development rights	10
2.5	Poole Core Strategy (adopted February 2009)	10
2.6	Purbeck Local Plan Part 1 (adopted November 2012).....	11
3	How are town centres changing?.....	12
3.1	Introduction.....	12
3.2	Published research.....	12
3.3	Market context.....	14
3.4	Economic context	17
3.5	Implications for Poole and Purbeck.....	19
4	How are centres in Poole, Purbeck and beyond performing?.....	21
4.1	Introduction.....	21
4.2	Poole Town Centre.....	21
4.3	Swanage.....	22
4.4	Wareham	22
4.5	Other centres within Poole and Purbeck.....	22
4.6	Locations outside Poole and Purbeck.....	22
4.7	Demand for commercial units throughout Poole and Purbeck.....	23
5	How the study area is defined and assessed.....	25
5.1	Introduction.....	25
6	Where are residents currently shopping?	28
6.1	Population growth in the study area	28
6.2	Future spend on comparison goods.....	28
6.3	Patterns of comparison goods spending	29
6.4	Spending patterns by zone.....	29
6.5	Future spend on convenience goods	41
6.6	Patterns of convenience goods spending	41
6.7	Summary of findings.....	46
7	Need for retail floorspace.....	49
7.1	Introduction.....	49
7.2	Assessment of quantitative retail need.....	49
7.3	Findings in relation to quantitative retail floorspace requirements	53
7.4	Assessment of qualitative need.....	54

7.5	Deficiencies in provision and consumer choice	55
7.6	Summary of need	57
8	The need for new commercial leisure floorspace.....	59
8.1	Introduction	59
8.2	Audit of provision	59
8.3	Leisure Spend Patterns	59
8.4	Growth in leisure spending	62
8.5	Summary	64
9	Strategy and recommendations	65
9.1	Introduction	65
9.2	Policy recommendations	65
9.3	Strategy recommendations	70
9.4	Monitoring.....	74
9.5	Analysis of floorspace requirement using a local SFT rate	3

Figures

Figure 3.1	Leading super market share, 1994-2014	15
Figure 3.2	Forecast of non-store retailing ('Special Forms of Trading') market share to 2031.....	18
Figure 3.3	Top 20 e-commerce websites in the UK, 2013	19
Figure 5.1	Study Area Zones 1-14	27
Figure 6.1	Proportion of expenditure retained in zone, within study area and leaked outside	34
Figure 6.2	Expenditure retained within Poole and Purbeck study area by zone.....	35
Figure 6.3	Expenditure spent within Poole town centre	36
Figure 6.4	Expenditure within Bournemouth by zone	37
Figure 6.5	Expenditure within Wimborne by zone.....	37
Figure 6.6	Expenditure within Dorchester by zone	38
Figure 6.7	Expenditure in the most popular retail parks.....	39
Figure 6.8	Summary of convenience goods spending patterns by zone	45
Figure 6.9	Convenience expenditure retained in each zone.....	46

Tables

Table 6.1	Comparison goods expenditure growth in study area.....	29
Table 6.2	Summary of comparison goods spending patterns by zone	30
Table 6.3	Expenditure in the most popular retail parks.....	39
Table 6.4	Comparison Sub-category Spend	40
Table 6.5	Convenience goods expenditure growth in study area	41
Table 6.6	Summary of convenience goods spending patterns by zone	42
Table 7.1	Experian Forecast Growth Rates: Comparison & Convenience I Spend.....	50
Table 7.2	Sales density growth rates	50
Table 7.3	Outstanding Commitments: Poole.....	51
Table 7.4	Outstanding Commitments: Purbeck.....	52
Table 7.5	Convenience Floorspace Requirements 2014-2031	53
Table 7.6	Comparison Floorspace Requirements 2014-2031	53
Table 7.7	Locally adjusted SFT rates – Comparison & convenience floorspace 2014-2031	54
Table 7.8	Over-trading and Under-trading analysis	55

Table 8.1 Most popular destinations for expenditure on leisure services (Purbeck residents) 60
Table 8.2 Most popular destinations for expenditure on leisure services (Poole residents) 61
Table 8.3 Leisure spend (totals by category) 62
Table 8.4 Leisure spend – study area 2014-2031 63
Table 9.1 Quantitative Need for Retail Floorspace (rounded to nearest 100) 65
Table A.1 SFT rates provided by NEMS 3
Table A.2 Local SFT estimated growth 3

Appendices

- Appendix A Healthchecks
- Appendix B Comparison, Convenience & Leisure Tables
- Appendix C Analysis of floorspace with local SFT

1 Introduction

1.1 Study aim

- 1.1.1 Purbeck District Council and the Borough of Poole have jointly commissioned Peter Brett Associates (PBA) to undertake a Town Centres, Retail and Leisure Study to understand the current function of the main town centres, along with identifying whether any additional retail and leisure floorspace is required in the plan period. The study will support the evidence base and inform the Poole Core Strategy Review and the Partial Review of Purbeck Local Plan Part 1 to 2031.
- 1.1.2 The purpose of the study is to provide a comprehensive assessment of the functional role of the main centres within the Borough of Poole and District of Purbeck, in terms of the retail and leisure facilities they provide for their community.
- 1.1.3 More specifically the study was commissioned to help the Councils understand and define the needs and character within Poole and Purbeck, by assessing:
- the locally independent retail offer and the diversity of retailing and leisure provision;
 - the distribution of uses and whether different areas are characterised by distinctive retail/leisure identities;
 - ways for the town to fulfil its retail and leisure potential, including whether any additional floorspace is required; and
 - what new uses could contribute to town vibrancy and importantly increase footfall in the town centre

1.2 Report structure

- 1.2.1 This report is set across nine chapters:
- Chapter 2 reviews national and local planning policy. This includes key elements of the National Planning Policy Framework to which this study must conform.
 - Chapter 3 provides an overview of the retail market including past trends and what is expected in the future.
 - Chapter 4 provides an assessment of Poole, Swanage and Wareham town centres and other smaller centres, drawing out strengths, weaknesses as well as opportunities. This is based on analysis of key indicators in comparison with other towns, and consultation with local commercial agents and business owners
 - Chapter 5 introduces the study and outlines the methodology.
 - Chapter 6 provides an overview of current patterns of retail spending, based on the results of a household survey conducted in August/September 2014.
 - Chapter 7 uses the results of the household survey to assess the quantitative and qualitative need for additional retail floorspace to 2031.
 - Chapter 8 assesses the need for leisure space
 - Chapter 9 discusses the implications of the findings and provides recommendations

2 Policy review

2.1.1 The following section briefly summarises the national planning policy and the local planning and retail / economic strategies that frame this study. It then sets out the important economic context which is driving important inputs and assumptions set out in this study.

2.2 Current planning policy framework

National Planning Policy Framework

- 2.2.1 On 27 March 2012, the Government published the National Planning Policy Framework (NPPF), which consolidates guidance set out in preceding Planning Policy Statements (PPS), Planning Policy Guidance (PPG), and a number of related circulars, into a single document. Following its publication, this document now forms the statutory national planning policy guidance against which plans are made and applications for new development must be assessed.
- 2.2.2 Paragraph 6 of the NPPF confirms that *'the purpose of the planning system is to contribute to the achievement of sustainable development'* and provides the economic, social and environmental implications of this for the planning system. Paragraph 9 adds that *'pursuing sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, as well as in people's quality of life' through a variety of means, including 'making it easier for jobs to be created in cities, towns and villages', and 'replacing poor design with better design'.*
- 2.2.3 The NPPF makes it clear that there should be a presumption in favour of sustainable development. For plan-making, this presumption in favour of sustainable development means that *'local planning authorities should positively seek opportunities to meet the development needs of their area'* and that *'Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change'* (unless the adverse impacts of doing so would significantly outweigh the benefits, or specific policies contained within the NPPF indicate that development should be restricted).
- 2.2.4 Paragraph 17 of the NPPF sets out a series of 12 'Core Planning Principles' which should underpin both plan-making and decision-taking. These 12 Principles include a requirement that planning should be 'genuinely plan-led', with 'succinct plans' to shape development of an area. Local planning authorities should also support sustainable economic development, and plans should take account of market signals to set out a clear strategy for allocating sufficient land for development.
- 2.2.5 Paragraphs 23 to 27 of the NPPF ('ensuring the vitality of town centres') pay particular attention to retail matters. The NPPF retains the approach set out in PPS6, PPS4 and preceding national planning guidance by advocating a 'town centres first approach', stating that planning policies should positively promote competitive town centre environments (paragraph 23). In drawing up Local Plans, LPAs should:
- **Recognise town centres** as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a **network and hierarchy of centres** that is resilient to anticipated future economic changes;
 - Define the extent of **town centres and primary shopping areas**, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;

- Promote **competitive town centres** that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- **Retain and enhance existing markets** and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- **Allocate a range of suitable sites** to meet the scale and type of development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- **Allocate appropriate edge of centre sites** for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- Set policies for the consideration of proposals for main town centre uses which **cannot be accommodated** in or adjacent to town centres;
- Recognise that **residential development** can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- Where town centres are in decline, local planning authorities should **plan positively for their future** to encourage economic activity.

2.2.6 Paragraphs 24 to 27 of the NPPF discuss the principal 'tests' which LPAs should apply to applications for retail development, which fall outside defined town centre locations. Firstly, applications for '*town centre uses*' (such as retail) outside defined centres will need to demonstrate compliance with the sequential approach - i.e. they must demonstrate the proposed scheme cannot be accommodated on an in-centre site (if the application site is in an edge-of-centre location), or either an in-centre or an edge-of-centre (if the application site is in an out-of-centre location). Both applicants and local planning authorities are expected to demonstrate flexibility on issues such as format and scale.

2.2.7 Applications for '*town centre uses*' outside defined centres which are above 2,500 sqm (or a locally-set threshold) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that in instances where a planning application cannot demonstrate compliance with either the sequential or impact 'tests', it should be refused planning permission.

Plan-making

2.2.8 Paragraphs 150 to 185 of the NPPF discuss plan-making, with paragraphs 150 to 157 focussing on the role of Local Plans. Paragraph 150 of the NPPF states '*Local Plans are the key to delivering sustainable development that reflects the vision and aspirations of local communities*' and that '*planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise*'.

2.2.9 The NPPF advises that local plans should be aspirational but realistic, and should set out 'opportunities for development and clear policies on what will or will not be permitted and where' as well as 'the strategic priorities for the area', including for the provision of retail, leisure and other commercial development.

Evidence base

- 2.2.10 The NPPF also identifies a requirement for local planning authorities to use a proportionate evidence base. Furthermore, local plans must be based on '*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*' and be comprehensive in their assessments, ensuring that they are '*integrated and that they take full account of relevant market and economic signals*' (paragraph 158).
- 2.2.11 As such, in relation to retail matters, the evidence base should assess, amongst other things (paragraph 161):
- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
 - The capacity of existing centres to accommodate new town centre development.

Examining Local Plans

- 2.2.12 The NPPF stipulates that Local Plans must undergo independent examination. In addition to showing a Local Plan has been prepared in accordance with the Duty to Cooperate, legal and procedural requirements; the Local Plan must also be found to be 'sound'. Paragraph 182 stipulates that a 'sound' plan is one that is:
- positively prepared – based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
 - justified – the plan should be the most appropriate strategy, when considered against reasonable alternatives, based on proportionate evidence base;
 - effective – the plan should be deliverable over the plan period; and
 - the plan should enable the delivery of sustainable development in accordance with policies in the Framework.

2.3 National Planning Practice Guidance (2014)

- 2.3.1 In 2014 Government published the Planning Practice Guidance (PPG) in order to provide further guidance on and support to the policies contained within the NPPF. The PPG is a web-based resource, which will be actively managed by the DCLG in order to allow for any necessary updates to be issued as soon as possible. The guidance will continue to be subject to a regular review process.
- 2.3.2 The PPG is set out thematically. Matters associated with town centre uses are set out in the section 'Ensuring the vitality of town centres'. This section states that a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres, which enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

- 2.3.3 The PPG also provides further guidance in terms of the interpretation of the NPPF's sequential and impact tests (discussed above), including how they should be applied to both plan-making and decision-taking. A stage-by-stage guide to undertaking an impact test is also provided.

2.4 Changes to permitted development rights

- 2.4.1 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. This order amends the Town and Country Planning (General Permitted Development) Order 1995. The aim of the policy is to reform the planning system so as to support "sustainable development" by encouraging the reuse of vacant property and by allowing building owners to unlock the value of their assets through a change of use. This reform is intended to make the planning system less bureaucratic and more responsive to changing demand.
- 2.4.2 The revised permitted development Rights have significant implications for High Streets and town centres. The most significant aspect of the revised policy is that property owners no longer need to apply for planning permission if the change of use is within the same class or, in some cases, the change of use is to dwellings. The Permitted Development Rights allows the change of use of retail units (A1) to professional and financial services (A2) without seeking planning consent or the conversion of office space (B1) to residential dwellings (C3). This kind of conversion requires prior approval from the Local Authority. New Permitted Development Rights that came into force in April 2014 permit the conversion of A1 and A2 space to C3 (Single residential Dwelling). Up to 150 square meters of A1/A2 space can be converted to residential use subject to prior approval. The amendment also introduced a new use class CA which permits the change of use of a retail unit to a bank or building society without applying for planning permission.
- 2.4.3 It is important to note that some areas are exempt from Permitted Development Rights. This includes Conservation Areas, World Heritage Sites and Areas of Outstanding Natural Beauty.

2.5 Poole Core Strategy (adopted February 2009)

- 2.5.1 The current Poole Core Strategy provides a framework for the long term spatial vision for the Borough of Poole and the strategic policies to deliver that vision.
- 2.5.2 As part of achieving this vision the Core Strategy outlines a number of strategic objectives that are particularly relevant to this study.
- Strategic objective 1: To transform and revitalise the town centre of Poole
 - The policy intends that Poole town centre will be a key location in achieving economic prosperity in the area, with the accommodation of new homes, commercial and retail developments. It recognises that investment in the town centre is a key priority and includes key outcomes as: improving the urban environment, providing better quality shops, improving the vitality of the centre in terms of activity levels and finally, supporting access to and within the centre, particularly in terms of public transport, cycling and walking.
 - Strategic objective 3: To nurture economic prosperity
 - The policy states ambitions to nurture growth, both in the town centre and the Port, but also in other important economic areas within the Borough
 - Strategic objective 6: To deliver high quality, distinctive and self-reliant places.

- The strategy recognises that local centres have important place in the Borough to serve local community needs. Key objectives to achieve this include improving the quality and range of services in these centres to ensure they are diverse, active and recognise their own distinctive character.

2.6 Purbeck Local Plan Part 1 (adopted November 2012)

2.6.1 Similarly, Purbeck Local Plan outlines a framework to guide development between 2006 and 2027. Its vision centres around ambitions to enhance the five spatial areas of Purbeck (North West Purbeck, South West Purbeck, Central Purbeck, North East Purbeck and South East Purbeck).

2.6.2 To achieve this the documents set out a number of spatial objectives including:

- Strategic Objective 1: Respect the character and distinctiveness of Purbeck's settlements and countryside.
- Strategic Objective 4: Support local communities.
- Strategic Objective 8: Promote a prosperous local economy.

3 How are town centres changing?

3.1 Introduction

3.1.1 The Study is being prepared in the midst of a renewed focus on the role and function of the high street, in the context of the recent, sustained economic downturn, continued attraction of out-of-town facilities as alternative shopping destinations, and the increasing popularity of online shopping. A number of independent studies have recently been published considering the future role and function of the high street, most significantly The Portas Review, The Grimsey Review and Beyond Retail's 'Redefining the Shape and Purpose of Town Centres'; we briefly summarise each of these below. We then continue to review the key trends which are likely to influence the demand for new retail floorspace over the study period.

3.2 Published research

The Portas Review (2011)

3.2.1 In May 2011, retail expert Mary Portas was appointed by the Government to lead an independent review into the future of the high street, largely in response to the stagnation and decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report, published in December 2011, suggest a number of measures to tackle the further decline of the high street.

3.2.2 Amongst 27 separate recommendations in the report, there is a call to strengthen planning policy in favour of 'town centre first' following the publication of the draft NPPF. The core recommendations included:

- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the 'Business Improvements Districts' (BID) model and encouraging new markets
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to 'deregulate' the high street and relax local authority restrictions that hold local businesses back
- Level the playing field: by making explicit within the NPPF a presumption in favour to town centre development, introduce Secretary of State 'exceptional sign off'; and encouraging large retailers to show their support for high streets by mentoring local businesses
- Define landlords' role and responsibilities: by encouraging a 'contract of care' between landlords and their commercial tenants, looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers
- Give communities greater say: by including the high street in neighbourhood planning, directing more developer funding to supporting community groups, and, encouraging innovative community uses of empty high street spaces

Government response to the Portas Review (2012)

3.2.3 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that 24 'Portas Pilot' towns secured funding to set up Town Teams to create plans for the future of their high streets and trial some of the recommendations made in the Portas Review. In addition, the Government will provide investment to help BIDs access loans for their set-up costs, as well as funding for

a High Street Innovation Fund (to help bring entrepreneurs back to their communities) and also a 'Future High Street X-Fund' (to reward towns which are delivering innovative plans to bring their town centres back to life).

- 3.2.4 The Government however did not support the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use its call-in powers sparingly.

The Grimsey Review (2013)

- 3.2.5 Bill Grimsey, the former boss of DIY chain Wickes and food retailer Iceland published his report 'The Grimsey Review: An alternative future for the High Street' in September 2013. This report was developed as an 'alternative response' to the recommendations of the Portas Review. The report makes a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

Beyond Retail: Redefining the Shape & Purpose of Town Centres (2013)

- 3.2.6 Arising from the key recommendations in the Portas Review, the Government supported the establishment of an industry 'task force' to analyse retail property issues relating to town centres. The task force included representatives from the banking, property, retail and public sectors, and the findings of the task force's report were presented in the 'Beyond Retail' report published in November 2013.

- 3.2.7 The report outlines a 'future vision' of high streets, based on five key observations:

- Market polarisation, resulting in three broad types of town centre offer (strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and localised convenience and everyday needs-focussed centres)
- A local authority will have a 'clear vision' of the role and function of their town centres, and the position of their respective retail offers in the hierarchy of centres
- Active intervention on the part of the local authority should be encouraged by a more flexible planning environment, including reduced regulation and a mix of public and private sector funding models
- A 're-basing' of occupational costs (in terms of rents and rates), to encourage an improved retail and leisure mix of profitable multiple and independent operators, supported by local employment and residential development in close proximity to town centres, and providing a flexible approach to car park pricing to assist in completion with out-of-town developments
- Technology as a critical enabler of future town centre relevance and vitality.

- 3.2.8 Based on this 'vision', the report makes a number of recommendations, and we consider those particularly pertinent to the centres to be:

- Develop strong and dynamic leadership, led at the local authority level but also including business and community involvement, to bring about long-term change in town centre functions

- Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth
- Provide greater flexibility in the planning system to enable redundant retail premises to be converted to 'more economically productive uses'
- Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres
- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs
- The business rate system should be reviewed, and new retail valuation guidance should be published.

3.3 Market context

3.3.1 The market context for town centres, and retail in particular, is evolving. The role of the town centre is not as black and white as it has historically been, and indications are that the town centres which have weathered the recent economic downturn (discussed further below) are those which have a diverse range of uses. In this section we discuss the key changes in the retail market which are considered likely to have the biggest implications on centres in Poole and Purbeck. These include:

- Polarisation to higher order centres
- Growth of the convenience goods sector
- Growth in commercial leisure provision

Key trend: polarisation to higher-order centres

3.3.2 The '**polarisation trend**' refers to the preference of national retailers to concentrate trading activities in larger schemes, within larger centres. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores offering a full range of their products, rather than a network of smaller-format stores which are only able to offer a limited range of products. Other trends discussed in this section, in particular the economic downturn and the growth in online shopping, have further amplified the need for retailers to have fewer physical stores. The 'polarisation trend' is also driven by customers, who have become more discerning and are increasingly prepared to travel further afield. There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres. CBRE estimated that by 2008 half the population shopped in just 70 or so major locations, down from 200 locations 30 years ago¹.

3.3.3 Centres such as those found in Poole and Purbeck are particularly susceptible to this trend, as retailers seeking to locate within the south are likely to focus their efforts on destinations such as Southampton, Bournemouth and Dorchester. It means that medium and smaller centres are required to potentially refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.

3.3.4 The result of this, according to Deloitte², is that retailers are beginning to reassess their store portfolios: '*The increasing costs of operating stores, changes in consumer behaviours, and the growing online opportunity, coupled with the rise of shopping centres with larger catchment*

¹ CBRE UK Retail Briefing, September 2008

² Deloitte, 'The Changing Face of Retail', 2011

areas and improvements in infrastructure facilitating travel suggest that retailers will need fewer stores in the future'

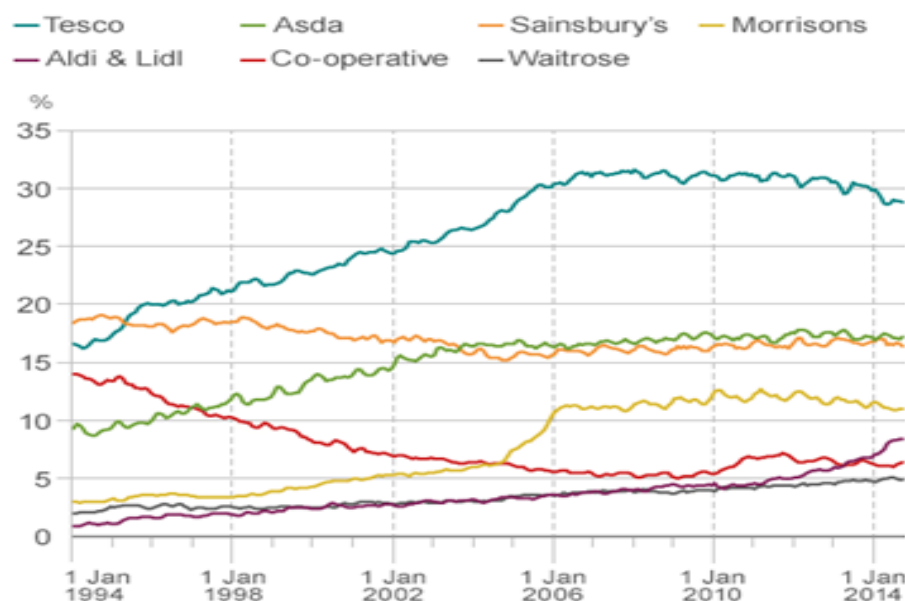
3.3.5 The implications for this on town centres is that many retailers will, in the medium to longer term, seek to downsize their portfolios, particularly in smaller centres. Deloitte consider that this will have three principal impacts on retail property:

- Firstly, increased availability of property as vacancy rates increase
- Secondly, decreasing prime retail rents (with the exception of central London)
- Thirdly, increased flexibility in rental terms, with retailers demanding better terms, including shorter leases, rent-free periods, earlier break clauses, and monthly rental arrangements.

Key trend: growth of the convenience goods sector

3.3.6 The **convenience goods** sector has, during the economic downturn, become a key driver of growth. The sector has traditionally been dominated by the 'big four' supermarket operators of Asda, Morrisons, Tesco and Sainsbury's, but increasingly both higher-quality operators (Waitrose, Marks & Spencer) and discount retailers (Aldi, Lidl) are making inroads into the market share of the 'big four'. The discount retailers have posted significant year-on-year growth in recent years and beginning to emerge as increasingly important forces in the convenience goods market. We expect these retailers to continue to take market share from the 'big four' supermarket operators in future years (see Figure 2)

Figure 3.1 Leading super market share, 1994-2014



Source: Kantar Worldpanel

3.3.7 The sector has often been the beneficiary of floorspace becoming available in town and city centres as a result of comparison goods retailers entering administration. For example, Iceland acquired 57 former Woolworths stores in early 2009, and recently Morrisons acquired a number of stores formerly operated by Blockbuster as part of their 'M Local' network of smaller-format stores. Tesco Express, Sainsbury's Local, and Waitrose have significantly expanded store numbers in recent years.

- 3.3.8 Large foodstores (i.e., typically those with a net retail area of at least 25,000 sq.ft / 2,300 sqm) have historically been the primary driver of growth in the convenience goods sector. However, acquisitions such as those described above are evidence of an increasing move by convenience goods operators away from opening larger-format stores towards smaller supermarkets and establishing a network of ‘top up’ convenience goods shopping facilities (often referred to as ‘c-stores’), often located in town centres, or district/ neighbourhood shopping parades. Both Sainsbury’s and Tesco now have more c-stores than large supermarkets³.

‘C store’ formats operated by Tesco, Sainsbury’s and Morrisons



- 3.3.9 Verdict Research⁴ comment that: *‘The second dip of the double-dip recession in 2012 has knocked consumer confidence... they are shopping little and often and sticking more tightly than ever to their budgets... increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable’.*
- 3.3.10 Verdict consider that the proportion of convenience goods floorspace which will be accounted for by ‘smaller stores’ will increase from 37.6% in 2007 to 41.6% by 2017. The majority of floorspace will continue to be accounted for by ‘superstores’ (53% of floorspace by 2017), with ‘food specialists’ and off-licences continuing to have their market share reduced. Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, from £33.9bn to £43.6bn, and the main retail operators are responding quickly by opening new stores.
- 3.3.11 The discount retail operators — led by Aldi and Lidl — also have substantial expansion plans over the next few years, and we expect these retailers to continue to take market share from the ‘big four’ supermarket operators.

Key trend: growth in commercial leisure

- 3.3.12 Most commentators predict that **commercial leisure**, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity for reduced demand for space for traditional retail, and partly driven by a shift to leisure expenditure as discretionary household expenditure rises.
- 3.3.13 When considering leisure expenditure available to households, spending on food and drink typically accounts for upwards of 50% of total leisure spending, compared to around 15% on ‘cultural services’ (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, ‘games of chance’ (such as bingo) and recreation/sporting services.
- 3.3.14 There is scope for town centres to capitalise on this, redefining their function as ‘destinations’ in their own right. This, in turn, can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake ‘linked trips’ between retail, leisure and other uses, and increase their dwell-time in the centre. The

³ Daily Telegraph, 12 January 2014

⁴ Verdict Research ‘Food & Grocery Retailing in the UK’ Market Report

development of a strong commercial leisure offer can also help to increase footfall outside of retail hours, for example in early evenings, particularly if the leisure offer also includes facilities such as cinemas.

3.4 Economic context

3.4.1 The recent downturn in the economy had a number of clear changes on the retail landscape in the UK, with a series of high-profile retailers entering administration, and a general trend towards discount retailers increasing their representation — both in the comparison goods sector (for example, Poundland, 99p Stores and Wilko) and the convenience goods sector (for example, the continued expansion, and strong trading performance of, 'deep discount' retailers such as Aldi and Lidl). The downturn also affected consumer spending, with a greater reluctance to spend amongst consumers on non-essential goods. As a result, forecast levels of growth in consumer spending remain generally subdued, particularly in the short term.

3.4.2 It has been widely documented that online shopping has increased at a rapid pace in recent years — particularly in the comparison goods sector. Online shopping is perceived to offer a number of significant advantages over 'traditional', high street-format shopping — including lower prices (as there are lower operating 'overheads' for online retailers compared with those in a town centre), a wider variety of choice, and the ability for customers to easily search out bargains — including second hand goods. While unfavourable economic conditions are forcing many retailers to scale back on physical retail space, their online operations allow them to reach a much wider customer base. However, the competition is not as straight forward as 'online shopping versus the high street'; new technologies are promoting an integration between the two shopping channels, to the point where a town centre that embraces digital technologies can find itself in a strong position.

3.4.3 Returning to the bigger picture, Internet sales have been rising much more rapidly than general retail sales in recent years. The average value of weekly retail sales in the UK on the internet was forecast at £844m in December 2012. The Office for National Statistics (ONS) forecast that online sales accounted for 9.4% of all UK retail sales in October 2012, which increased to 10.5% in October 2013 (equivalent to a year-on-year increase of 1.1 percentage points). Experian consider that this pattern is likely to remain the case for the foreseeable future, commenting in their Retail Planner Briefing Note (October 2014) that:

'We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012... growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing'.

3.4.4 However, Experian consider that at the turn of the next decade, growth in online shopping is expected to begin to plateau:

'We expect that the SFT⁵ market share will continue to increase over the forecast period⁶ although the pace of e-commerce growth will moderate markedly after about 2020'.

3.4.5 The outputs of this study specifically take into account this anticipated growth in online shopping. Based on the most up-to-date Experian guidance we remove the proportion of total expenditure which is expected to be diverted towards online shopping, before presenting the final updated quantitative floorspace requirements for the District⁷. In **Figure 3.2** we show the

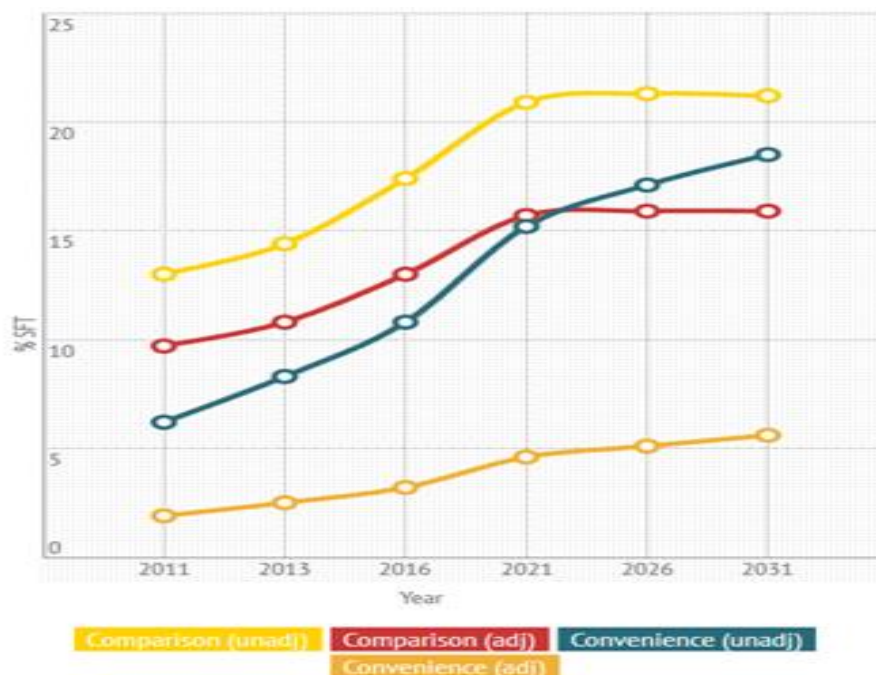
⁵ 'Special Forms of Trading', which includes online shopping as well as sales from markets and mail order.

⁶ Experian currently project up to 2031.

⁷ The figures which we use are Experian's 'adjusted' comparison (non-food) and convenience (food) goods forecasts, which make a deduction on Experian's 'baseline' figures in order to take account of internet goods sales from store space (such as through 'Click & Collect', as discussed below). For comparison goods, Experian apply a discount of 25% to calculate the 'adjusted' figure, and for convenience goods this figure is 70%. The latter figure is particularly high because many online food

projected growth in online comparison and convenience goods shopping over the course of the study period to 2031, based on the forecasts provided by Experian. For reference, both the 'unadjusted' and the 'adjusted' figures are shown, although for the purposes of our study we solely rely on the latter set of figures.

Figure 3.2 Forecast of non-store retailing ('Special Forms of Trading') market share to 2031



Source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3. SFT includes spending on online shopping, mail order / catalogue shopping, and markets. 'Adjusted' figures include a reduction for store-picked online transactions.

3.4.6 As suggested above, this forecast further growth in online spending does not equate to a redundant future for 'bricks and mortar' stores. There is a role for physical outlets to act as 'showrooms' for online retailers⁸. A physical presence on the high street improves the visibility of businesses, and it is noteworthy that 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street (Figure 3.3).

shopping transactions placed with Sainsbury's, Tesco, Asda and Waitrose are 'picked' from the shelves of the nearest large store of the retailer. Convenience goods retailers are increasingly choosing to instead fulfil orders from warehouses known as 'dark stores' — although this trend remains in its infancy.

⁸ This is where customers visit 'bricks and mortar' stores to look at / try on a product, before using technology such as smartphones to check whether the product is available elsewhere (in another store, or online) for a cheaper price.

Figure 3.3 Top 20 e-commerce websites in the UK, 2013



Source: IMRG Experian Hitwise Hot Shops List, 2013

- 3.4.7 The growth in the 'Click & Collect' method of online shopping is a further relatively new trend, but one which looks set to play an increasing role over future years. Like 'showrooming', it is also one where the physical outlet of the store can still be used to drive footfall. The 'click & collect' concept is such that a customer orders and pays for the desired product online, and then collects the product from the nearest large branch of the retailer in question. This approach is being rolled out by an increasing number of retailers. Recent research by the British Retail Consortium indicates that 60% of 'click & collect' transactions result in an additional purchase in the store.
- 3.4.8 Recent trends indicate that major retailers are becoming more willing to embrace the challenge posed by online and mobile technology, putting into place technology such as better mobile websites, offering free in-store Wi-Fi, or in-store technology points where a customer can order a product online which may be sold out or not available within the store. This may be particularly applicable for smaller town centres, where many retailers' stores are quite small and may not be able to stock the full range of products available.
- 3.4.9 There is, therefore, a role for 'bricks and mortar' stores, but there is an acute challenge for smaller centres which will need to be embraced. The role and function of high streets — particularly those outside the higher-order shopping centres — are likely to need to consider uses beyond that of traditional retail activity in order to remain vital and viable.

3.5 Implications for Poole and Purbeck

- 3.5.1 There is little doubt that recent years have seen challenges to 'traditional' store-based shopping on a scale never previously witnessed. These challenges will continue to grow over each Council's Plan period, and in order for the centres in the study area to perform strongly and meet local needs, they will need to adapt to, and embrace, these challenges. However, it is quite clear that there remains a role for store-based shopping - and for town centres. Experian forecast that store-based shopping is still expected to expand at an average of 1.9% per annum in capita terms to 2030, and online sales will begin to plateau.
- 3.5.2 In our view, the most successful town centres will be the ones that adapt to the changes in shopping habits, which move away from solely being shopping destinations to those which offer a broad range of retail, leisure, cultural and civic services to enable residents to have

multiple reasons to visit a town centre, and to spend longer amounts of time in the centres. Successful town centres will need to embrace and work alongside multi-channelling retailing, through the availability of free Wi-Fi, promotional offers, 'click & collect' hubs, and so on. There will need to be a willingness for the higher-order centres in Poole and Purbeck to embrace the wider changes in shopping and spending patterns, and capitalise on them rather than compete with them.

- 3.5.3 There will also be an important role for niche / curated retail destinations, which are able to compete with advances in online / mobile technology because they offer a different experience, one based around high standards of customer service, and a unique retail offer which cannot be matched online.
- 3.5.4 Related to this, we therefore expect that place marketing and 'selling' the offer of a town centre will become of increasing importance.

4 How are centres in Poole, Purbeck and beyond performing?

4.1 Introduction

- 4.1.1 In this section we present an overview of the existing retail, leisure and other town centre uses in the principal centres around Poole and Purbeck, namely **Poole Town Centre**, **Wareham**, and **Swanage**. Each Council's adopted planning policy confirms these centres as the highest order centres.
- 4.1.2 A more detailed appraisal of each of these centres, as well as smaller centres in Poole and Purbeck (**Upper Parkstone**, **Ashley Cross**, **Broadstone** and **Corfe Castle**) is set out in **Appendix A** of the Study. In reviewing the existing uses and current performance of each centre we have had regard to the 'health check' indicators set out in the PPG, and have undertaken assessments based on visits to each centre, and the use of third-party data sources such as Experian Goad and the CoStar Focus Commercial Property Database, for centres where this information is available.
- 4.1.3 To provide further context to the study, we also set out our assessment of out-of-centre retail floorspace provision in the District, and also a review of the offer in competing nearby centres such as **Southampton**, **Bournemouth**, **Wimborne** and **Dorchester**.

4.2 Poole Town Centre

- 4.2.1 Poole is the highest order centre in the Borough of Poole, and a principal centre for comparison retail, civic facilities, arts and culture. The range, quality and number of units within the centre also mean that Poole town is likely to be a key destination amongst respondents from neighbouring Purbeck District (which will be discussed in more detail in the following chapters). The centre has a long, linear form containing a number of distinct areas where the offer, mix and quality of the retail environment differs.
- 4.2.2 The healthchecks (see Appendix A for full details) consider three broad areas:
- **Town Centre North** is considered to be the primary shopping environment and includes the Dolphin centre, Falkland square and a small number of units at the northernmost point of the high street
 - **Lower High Street**, covers the area from Town Centre North towards the Quay
 - **Other areas** are predominantly comprised of retail units around the Quay side.
- 4.2.3 The vacancy rates are particularly high within centre of Poole (as defined by GOAD) at nearly 17% of the total units, equating to approximately 10% of the total floorspace. Furthermore, vacancy rate in both the **Town Centre north** area (14.9%) and the **Lower High Street** (13.9%) sections are above the UK average of 12.5% (GOAD). Many units within the centre appear to have also been vacant for over a year, which is also a cause for concern as long terms vacancy suggest lack of demand and inappropriate stock for the market. These high vacancy rates subsequently mean that many areas within the centre appear rather tired and neglected in places.
- 4.2.4 In terms of diversity of units, the centre appears to perform particularly well. Convenience units are similar to the national average, and the centre has two large stores in Sainsburys, and ASDA. The number of comparison units is also similar to the national averages with a higher than average representation in clothing retailers, largely found in the **Town Centre**

North area. Service units have a slightly lower representation, and are largely found within the **Lower High street** section.

- 4.2.5 Aside from these uses, the centre has some tourist and leisure uses, although these are in two areas at either end on the centre. One towards the north of the town, where the Lighthouse centre offers a modern arts centre, and the second area around the Quay side. This location contains a number of bars and restaurants and is where the majority of Poole's evening economy is sustained. Additionally, there are a number of units such as the museum, which make this area particularly popular with tourists.

4.3 Swanage

- 4.3.1 Swanage is the largest centre in Purbeck District, a coastal town containing approximately 150 units. The healthchecks identify Swanage as an attractive retail environment comprising of a Station Road which acts as the main retail street, and the High Street, which has a number of leisure units such as bars and restaurants. Unlike Poole, the centre does not have an issue with vacancy rates, with the proportion of units classed as vacant considerably lower than the national average (3.87% compared to 21.5% nationally). Although this can be seasonal with vacancies rising slightly during the winter period.

- 4.3.2 The proportion of convenience units is similar to the UK average, whilst the proportion of comparison units appears considerably higher. In terms of comparison retailers, there is a lower than average representation of clothing retailers, suggesting that other centres are preferred for this type of goods. The high proportion of leisure units throughout the town is characteristic of the town's status as a popular tourist location.

4.4 Wareham

- 4.4.1 Wareham is the second largest retail centre in Purbeck, comprising of approximately 100 units. Similar to Swanage, the retail environment is particularly attractive and again has a particularly low vacancy rate, with 3.5% (when compared to the national figure of 12.5%).
- 4.4.2 In terms of diversity of uses, the number of convenience units is made up of a Sainsbury's and a Co-operative in the centre, along with a number of smaller, traditional premises reflecting Wareham's character as an historic market town. The offer of comparison units is higher than the national average, although this figure is bolstered by a higher than average number of charity throughout the centre. Although at first glance the number of service retailers appears in line with national averages, this number is slightly skewed by a high proportion of restaurant and leisure units, predominantly found towards the southern part of the high street, near the quay.

4.5 Other centres within Poole and Purbeck

- 4.5.1 The other smaller centres within Poole and Purbeck have also been considered in terms of their role and character. A review of each of these centres is set out in Appendix A.

4.6 Locations outside Poole and Purbeck

- 4.6.1 It is important to also note that Poole and Purbeck is surrounded by a number of other shopping destinations which residents are likely to look towards for their shopping needs. The geography of the area means that some residents will, in practical terms, be closer to surrounding centres than to centres within Poole and Purbeck. In the remainder of this section we therefore consider the offer in these centres and the extent to which they are likely to compete for spending with centres in Poole and Purbeck.

Southampton

- 4.6.2 Southampton is a large retail and employment hub on the south coast, approximately an hour's drive away from Poole town centre, and is considered as one of the top UK retail destinations. The centre has two large shopping centres, West Quay shopping centre and Marlands shopping centre, amongst other retail areas such as Above Bar St, Queensway and Bedford Place. The centre has a good range of convenience and comparison units, along with a number of leisure units which help provide a vibrant evening economy. Although the centre is a considerable distance from Poole it is likely that given its size it may attract some expenditure, particularly for comparison goods.

Bournemouth

- 4.6.3 Bournemouth town centre is approximately 15 minutes' drive away from Poole town centre. The main shopping areas can be considered as 'The Square', 'The Triangle' and 'Lansdowne', although there are a number of other areas. Close to the seafront, the centre contains a number of larger, national brands amongst many smaller independent shops. Additionally, the centre has a number of retail parks in close proximity such as Castlepoint Shopping centre and Turbary / Ringwood retail parks. In 2013 Bournemouth adopted an Area Action Plan (AAP) designed to attract and guide investment in Bournemouth town centre. The plan sets out a vision for enhancing the town centre public realm, support new homes and deliver 23,000 sq.m of floorspace.

Wimborne Minster

- 4.6.4 Wimborne Minster is a market town a short distance to the north of Poole and Purbeck, approximately 25 minutes drive away from Wareham and Poole. As opposed to Southampton and Bournemouth, Wimborne Minster represents a much smaller retail environment, but its 15th, 16th and 17th century historic buildings provide an interesting shopping environment.

Dorchester

- 4.6.5 The county town of Dorchester is situated immediately west of Purbeck, approximately 20 minutes drive away from Wareham and 30 minutes drive away from Poole. The centre has a wide range of retailers, and in recent years has opened Brewery Square a £100m regeneration scheme including a range of retail and leisure facilities such as a cinema, restaurants and a hotel.

Weymouth

- 4.6.6 Weymouth is a coastal town also situated immediately west of Purbeck District. The centre has a number of larger retailers, particularly in the areas around new Bond Street near the harbourside. Of the two locations in close proximity to the west of Purbeck District, Dorchester and Weymouth, the retail environment in Dorchester is likely to be more favoured by residents in Poole and Purbeck due to it being marginally easier to access via current infrastructure.

4.7 Demand for commercial units throughout Poole and Purbeck

- 4.7.1 Our consultation with local agents found that there is relatively little demand for new retail premises within Poole, many stating that this is in part due to the large availability of vacant properties within the centre already. Furthermore, many agents stated that the majority of the new premises coming onto the market are predominantly refurbished properties as opposed to new units. Similarly, many agents that we spoke to recommended that there was little, if any, demand for new office units.

- 4.7.2 At the time of this study, there appears to be little interest in Poole and Purbeck from national multiples. The exception to this is mainly in the form of budget convenience retailers, such as Poundland who have expressed an interest to locate within Poole, and similarly, Aldi who have expressed an interest to locate in Poole and Swanage. Additionally, there appears to be some demand from nationally recognised restaurant / food outlets, with Frankie and Benny's, Hotcha and Millie's Cookies interested in premises in Poole. The demand for retail units by larger multiples in general appears notably greater within nearby centres such as Dorchester, Bournemouth, Weymouth and Christchurch.

5 How the study area is defined and assessed

5.1 Introduction

5.1.1 The starting point for considering future retail trends and needs is to establish current patterns of retail spending. Spending patterns are influenced by a number of factors including social and demographic profile of the catchment, levels of prosperity and deprivation, disposable income, choice of the retail offer, quality of the shopping experience, access to transport and work patterns.

5.1.2 The study includes a bespoke telephone survey undertaken by NEMS Market Research during August and September 2014 of households within the study area to help us understand the patterns of retail spending in the study area. The full tabulated results can be found in **Appendix 2** of this report. In summary, the approach was as follows:

- Completed surveys were obtained from 1,500 households⁹ in 14 defined zones across Poole and Purbeck. **Figure 5.1** illustrates the wider study area.
- Questions were asked on convenience (food and grocery shopping) and comparison (non-food shopping)
- Weightings are applied to the answers to achieve a composite market share for spending on convenience goods and comparison goods.
- The market share outputs are converted to a 2014 monetary value by applying the catchment area resident expenditure to the percentage market shares. This exercise enables an understanding of where residents of the study area are spending their money in 2014.

5.1.3 To do this, the district was sub-divided in order to get an accurate indication of spending patterns for residents in different parts of the District, and shows a total of 14 survey zones, as follows:

- Zone 1: Swanage
- Zone 2: Wareham
- Zone 3: Puddletown and rural west
- Zone 4: Upton and Hamworthy
- Zone 5: Poole town centre
- Zone 6: Parkstone and Canford Cliffs
- Zone 7: Oakdale
- Zone 8: Creekmoor
- Zone 9: Lytchett Matravers
- Zone 10: Broadstone

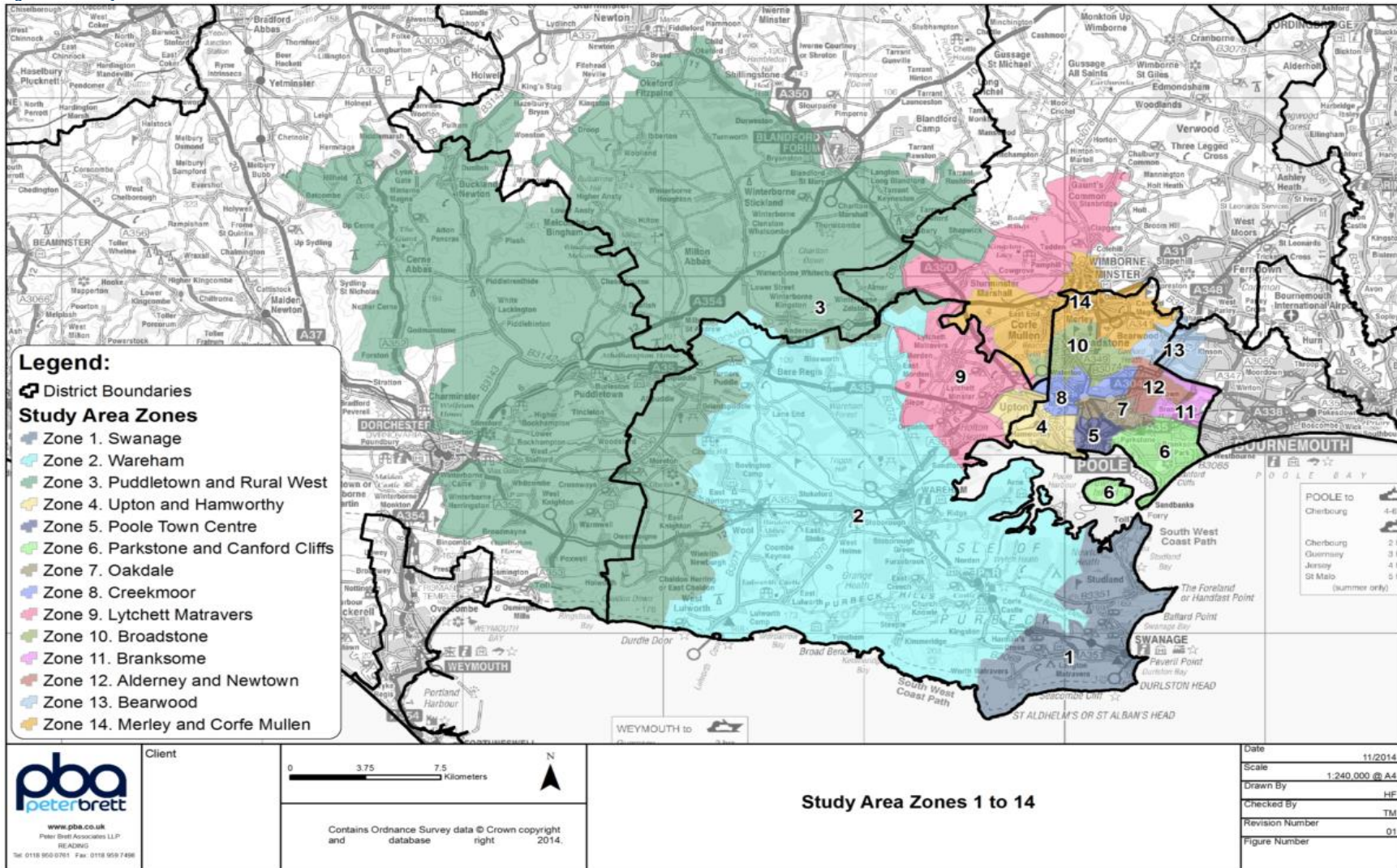
⁹ It is considered that 1,500 completed interviews is statistically robust with a statistical accuracy at 95% confidence level (+2.5%)

- Zone 11: Branksome
- Zone 12: Alderney and Newtown
- Zone 13: Bearwood
- Zone 14: Merley and Corfe Mullen

5.1.4 Each zone has broadly the same resident population and is based on postcode sectors. The exact coverage of the zones can be seen in **Figure 5.1** below.

5.1.5 We use these zones as the basis of our assessment in the remainder of this report and use the term 'study area' to mean within zones 1 to 14. Conversely, we refer to expenditure 'leaked' outside the 'study area' as retail spend that is made in locations outside those identified in **Figure 5.1**, for instance Bournemouth. Please note that the study area does not exactly match with administrative boundary for each of the authority areas.

Figure 5.1 Study Area Zones 1-14



6 Where are residents currently shopping?

6.1.1 This section should be read alongside the full market shares and spending patterns tables set out at **Appendix B**.

6.1 Population growth in the study area

6.1.1 To understand the quantity of floorspace required throughout the local plan period it is important to understand both, the current population's expenditure and the outlook for the future expenditure.

6.1.2 **T1** of **Appendix B** sets out the population of the study area - 256,877 people (Experian's Micromarketer Generation model (MMG3)). Experian MMG expects population to grow by, on average, 12.3% by the end of the plan period (2031), which is equivalent to a growth of 31,712 persons.

6.1.3 Important for this study, Experian MMG gives a prediction of population change sub-divided into the zones discussed above, with total growth in population in each of the zones ranging between 8.6% and 14.5%.

6.1.4 It should be noted that the population figures are for the study area, which as previously discussed is based on postcode areas, as these better reflect the catchments of shopping and leisure destinations, rather than administrative local authority boundaries. Therefore the figures presented in this report can't be directly compared with other studies such as The Eastern Dorset Strategic Housing Market Assessment, November 2014 (SHMA) as these will be based on different geographies. However, both this study and SHMA use the same ONS baseline.

6.2 Future spend on comparison goods

6.2.1 We also account for growth in retail expenditure across each zone. **T2** in **Appendix B** shows the expected growth in per capita expenditure in comparison goods over the period. The expenditure has been projected forward in accordance with Experian's Retail Planner Briefing Note, and as can be seen in the table are expected to rise by approximately 75.2% between 2014 and 2031.

6.2.2 **T3** in **Appendix B** multiplies the population forecasts in **T1** with the per capita expenditure forecasts in **T2**. It shows that, having deducted a proportion of the total expenditure that is expected to be categorised as 'special forms of trading' (SFT) (such as online shopping, and using SFT discount rates set out in Experian Retail Planner Briefing Note 12), there is currently £891.2m of comparison goods expenditure available to residents in the catchment area, however £104.3 of this is spent on the internet and other non-store based transactions as SFT. The total expenditure will increase over the course of the study period as shown in **Table 6.1**. Overall, comparison goods expenditure, excluding SFT is expected to increase by £694.6m by 2031. This equates to an increase of 88%.

Table 6.1 Comparison goods expenditure growth in study area

	2014	2019	2024	2029	2031
Total comparison goods expenditure excluding SFT (£m)	£786.9	£933.4	£1,131.2	£1,372.4	£1,481.5
Total comparison goods expenditure on SFT (Experian based estimate)	£104.3	£168.6	£215.5	£255.6	£271.8

Source: Table 3, Appendix B

6.3 Patterns of comparison goods spending

- 6.3.1 The household telephone survey identifies where residents in the study are currently shopping. **T4 (Appendix B)** sets out where residents are undertaking their comparison goods shopping in percentage form, and **T5** converts these percentages into monetary values, by applying the percentages in **T4** to the total expenditure figures in **T3**.
- 6.3.2 **T5**, therefore, presents the current expenditure amount for residents for the whole of 2014. The columns show the expenditure made by residents belonging to each zone, and separates the zones 1 along to 14. For instance for residents living in Zone 1, reading downwards, they spend £7.3m in Swanage, £0.5m in Wareham and so on.
- 6.3.3 Towards the lowest section of the table is a section entitled '2. Locations outside the study area'. This section indicates where respondents are shopping in locations other than those located in zones 1 to 14. Again reading down the table, residents in zone 1 spend £3.3m in Bournemouth, £0.6m in Castlepoint retail park and so forth.
- 6.3.4 The figure at the very top and the very foot of the table shows the total current expenditure by residents living in each zone. For instance zone 1 (Swanage) residents spend a total of £30.8m. This figure is made up of the total amount spent within the study area (zones 1 to 14, which for zone 1 is £22.6m) and also outside the study area (which for zone 1 is £8.2m)
- 6.3.5 The rows reveal shopping patterns of residents to a specific location or shop. For instance, the first row, titled 'Swanage' reveals that £7.3m is spent within Swanage by zone 1 residents, £0.5m is spent by zone 2 residents, £0m is spent by zone 3 residents and so on. The total amount spent in that location or store is calculated towards the right of the table, in the case of Swanage £7.9m is spent by zones 1 to 14 in total.
- 6.3.6 A number of the other tables in Appendix 2 follow a similar format.

6.4 Spending patterns by zone

- 6.4.1 Clearly, spending patterns are not uniform across the study area, and are instead influenced by various factors such as the availability and quality of retail opportunities. **Table 6.2** summarises where residents in each part of the study area are undertaking their comparison goods spending. This helps to determine the extent of catchment areas of individual centres within the study area. **Table 6.2** highlights the main points from **T5**, in particular:
- how much is spent by residents in a zone;
 - how much do the residents spend within their own zone;

- how much do residents spend within the study area (often referred to as the proportion retained);
- where the most popular location is for expenditure within the study area;
- how much is spent in destinations outside the study area (often referred to as the proportion leaked);
- where the most popular location is for expenditure outside of the study area.

Table 6.2 Summary of comparison goods spending patterns by zone

Zone	Principal comparison goods shopping destination	Summary of patterns of spending
Zone 1: Swanage	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 1 generate a total £30.8m in comparison expenditure. ▪ £7.3m (24%) is spent within zone 1, predominantly within Swanage. Wareham town centre accounts for 2% of the total spend. ▪ £22.6m (74%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £10.5m (34%) of the total spend. ▪ £8.2m (26%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £3.3m (11%). Dorchester and Southampton account for around £0.7m (2.4%) each.
Zone 2: Wareham	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 2 generate a total £62.2m in comparison expenditure. ▪ A relatively small amount £3.3m (5%) is retained within zone 2. ▪ £45.4m (73%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £22m (35%) of the total spend. ▪ Swanage town centre accounts for 1% of the total spend, which is also particularly low given the proximity between neighbouring zones. Instead it appears that residents in zone 2 prefer to travel to Poole town centre, where the retail offer is notably wider, rather than Swanage. ▪ £16.8m (27%) is leaked to locations outside of the study area, of which Dorchester is the most popular destination attracting £5.4m (9%).
Zone 3: Puddletown and rural west	Dorchester	<ul style="list-style-type: none"> ▪ Residents in zone 3 generate a total £87.5m in comparison expenditure. ▪ Only £0.1m (<1%) is retained within Zone 3, due to the rural nature of the zone comprising only villages and hamlets ▪ A relatively small amount of the total, £30.7m (35%),

Zone	Principal comparison goods shopping destination	Summary of patterns of spending
		<p>is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £16.6 (19%) of the total spend.</p> <ul style="list-style-type: none"> £56.8m (65%) is leaked to locations outside of the study area, of which Dorchester is the most popular destination attracting £28.5m (33%), with Blandford Forum also attracting a significant proportion, £13.1m (15%) due to each town lying in close proximity to the zone, when compared to Poole.
Zone 4: Upton & Hamworthy	Poole Town Centre	<ul style="list-style-type: none"> Residents in zone 4 generate a total £58.5m in comparison expenditure. Only £0.4m (<1%) is retained within Zone 4, due to the lack of a strong retail centre in the zone A high proportion, £52.1m (89%), is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £24.8m (42%) of the total spend. £6.4m (11%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £2.5m (4%).
Zone 5: Poole Town Centre	Poole Town Centre	<ul style="list-style-type: none"> Residents in zone 5 generate a total £33.6m in comparison expenditure. £21.8m (65%) is retained within zone 5, due to the proximity of the shops to local residents £30m (89%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in Zone 5 accounting for £20m (60%) of the total spend. Of the amount spent within the zone but not in the town centre, the most popular areas appear to be retail parks, in particular Wessex Gate and Fleetsbridge. £3.6m (11%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £1.7m (5%).
Zone 6: Parkstone and Canford Cliffs	Poole Town Centre	<ul style="list-style-type: none"> Residents in zone 6 generate a total £90.6m in comparison expenditure. £10.9m (12%) is retained within zone 6 £61.9m (68%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £30.3m (33%) of the total spend. £28.7m (32%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £16.2m (18%).
Zone 7:	Poole Town Centre	<ul style="list-style-type: none"> Residents in zone 7 generate a total £54.7m in

Zone	Principal comparison goods shopping destination	Summary of patterns of spending
Oakdale		<p>comparison expenditure.</p> <ul style="list-style-type: none"> ▪ £8.6m (16%) is retained within zone 7, predominantly within Wessex gate retail park. ▪ £46m (84%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £23.9m (44%) of the total spend. ▪ £8.7m (16%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £4.3m (8%).
Zone 8: Creekmoor	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 8 generate a total £46.8m in comparison expenditure. ▪ £9.9m (21%) is retained within zone 8 ▪ £39.6m (85%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £22m (47%) of the total spend. ▪ £7.2m (15%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £3.1m (6.6%).
Zone 9: Lytchett Matravers	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 9 generate a total £29m in comparison expenditure. ▪ Only £0.4m (1%) is retained within zone 9, due to the rural nature of the zone ▪ £20.2m (70%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £12.7m (44%) of the total spend. ▪ £8.8m (30%) is leaked to locations outside of the study area, of which Wimborne is the most popular destination attracting £2.7m (9%).
Zone 10: Broadstone	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 10 generate a total £68.7m in comparison expenditure. ▪ £7.5m (11%) is retained within zone 10 ▪ £53.5m (78%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £20.5m (30%) of the total spend. ▪ £15.1m (22%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £5.9m (9%).
Zone 11: Branksome	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 11 generate a total £53.2m in comparison expenditure. ▪ £2.1m (4%) is retained within zone 11 ▪ £37.6m (71%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5

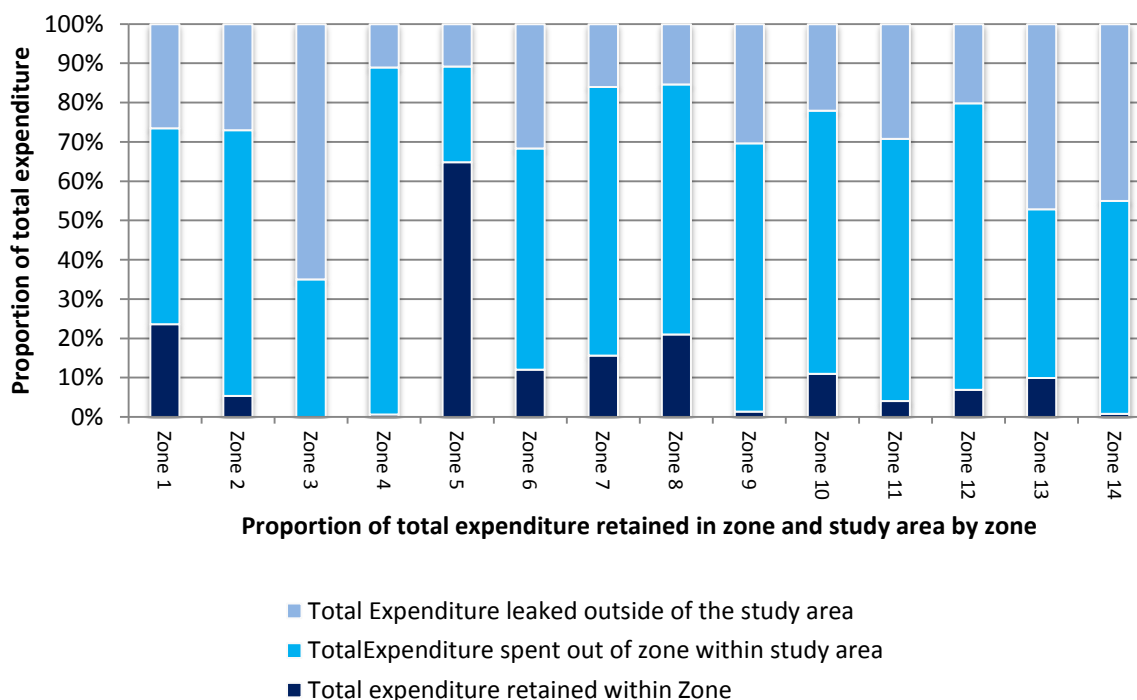
Zone	Principal comparison goods shopping destination	Summary of patterns of spending
		<p>accounting for £21.7m (41%) of the total spend.</p> <ul style="list-style-type: none"> ▪ £15.5m (29%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £8.2m (15%).
Zone 12: Alderney and Newtown	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 12 generate a total £45.2m in comparison expenditure. ▪ £3.1m (7%) is retained within zone 12 ▪ £36.1m (80%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £14.7m (32%) of the total spend. ▪ £9.1m (20%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £4.9m (11%).
Zone 13: Bearwood	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 13 generate a total £53.3m in comparison expenditure. ▪ £5.3m (10%) is retained within zone 13 ▪ £28.2m (53%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £8.5m (16%) of the total spend. ▪ £25.1m (47%) is leaked to locations outside of the study area, of which Bournemouth is the most popular destination attracting £10.2m (19%). Bournemouth and Poole town centres are a similar distance from this zone, but Bournemouth is the bigger draw.
Zone 14: Merley and Corfe Mullen	Poole Town Centre	<ul style="list-style-type: none"> ▪ Residents in zone 14 generate a total £72.7m in comparison expenditure. ▪ Only £0.6m (1%) is retained within zone 14 due to the rural nature of the zone ▪ £40m (55%) is retained within the study area. The most popular destination in the study area for comparison spend is Poole town centre in zone 5 accounting for £20.9m (29%) of the total spend. ▪ £32.7m (45%) is leaked to locations outside of the study area, of which Wimborne is the most popular destination attracting £16.4m (23%), due to its close proximity to the zone.

Source: Table 5, Appendix B

Retention and Leakage

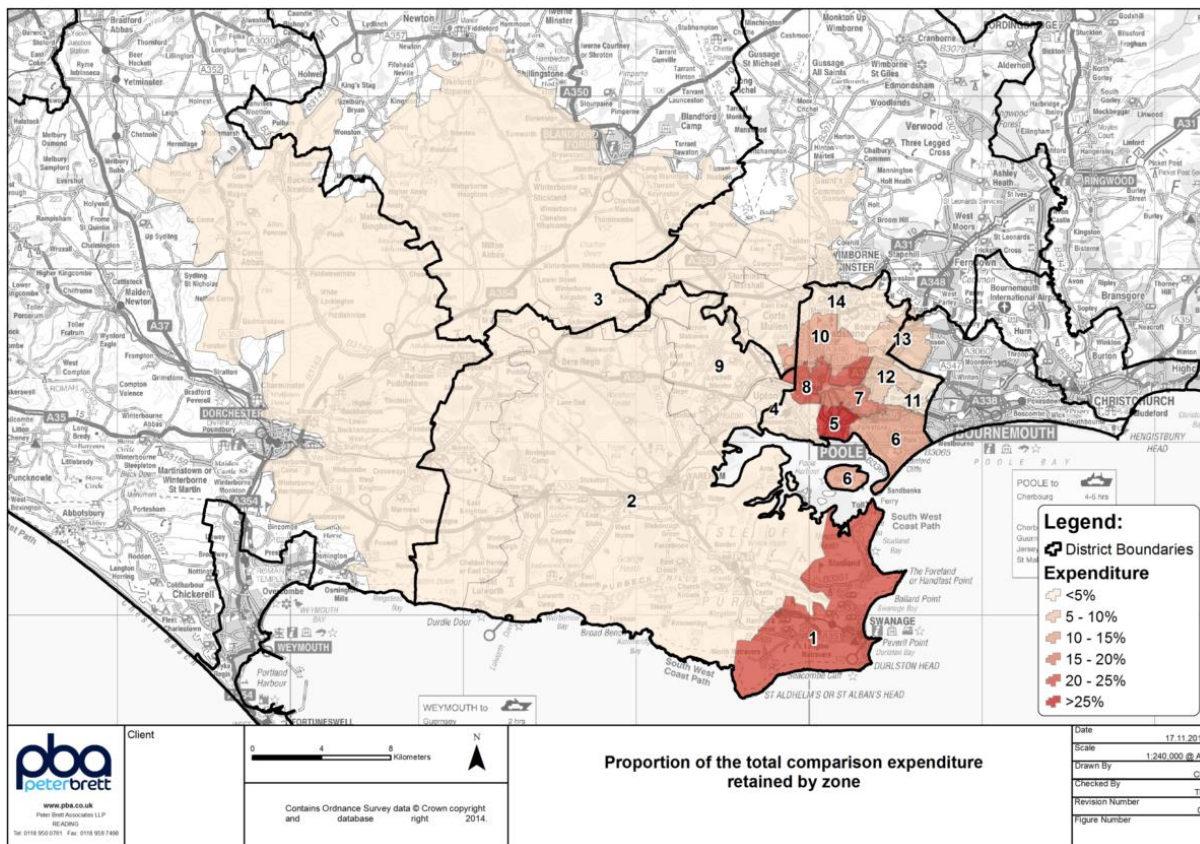
6.4.2 **Figure 6.1** is of importance as it provides a summary of **Table 6.2** of how the various zones retain expenditure, both in terms of expenditure retained in their zone and in terms of the study area as a whole. The darker coloured bars show the percentage of expenditure retained in their zone, the middle section shows the expenditure not in the zone but within the study area (zones 1-14) and finally the lighter bars at the top of the chart shows the proportion leaked outside the study area.

Figure 6.1 Proportion of expenditure retained in zone, within study area and leaked outside



6.4.3 **Figure 6.1** identifies that the study area retains a considerable portion of expenditure within the study zone. The average expenditure retained across all zones is approximately 70%, meaning, on average, 30% is leaked to locations outside of the study area. As expected zones closer to Poole town centre, such as zones 4 (Upton & Hamworthy), 7 (Oakdale) & 8 (Creekmoor) have higher retention rates than those on the periphery of the study area. Zones 3 (Puddletown and rural west) and 13 (Bearwood) are the only zones where leakage to a competing centre, is higher than comparison spend in Poole town centre. Perhaps surprisingly is the level of retention within Zone 1, given it is a relatively small centre, and the overall retention of residents within zone 1 within the wider study area. In terms of leakage, **Table T5 Appendix B** identifies that Bournemouth, Castlepoint Shopping Park, Dorchester and Wimborne are the most popular destinations for expenditure for destinations outside of the study area.

Figure 6.2 Expenditure retained within Poole and Purbeck study area by zone

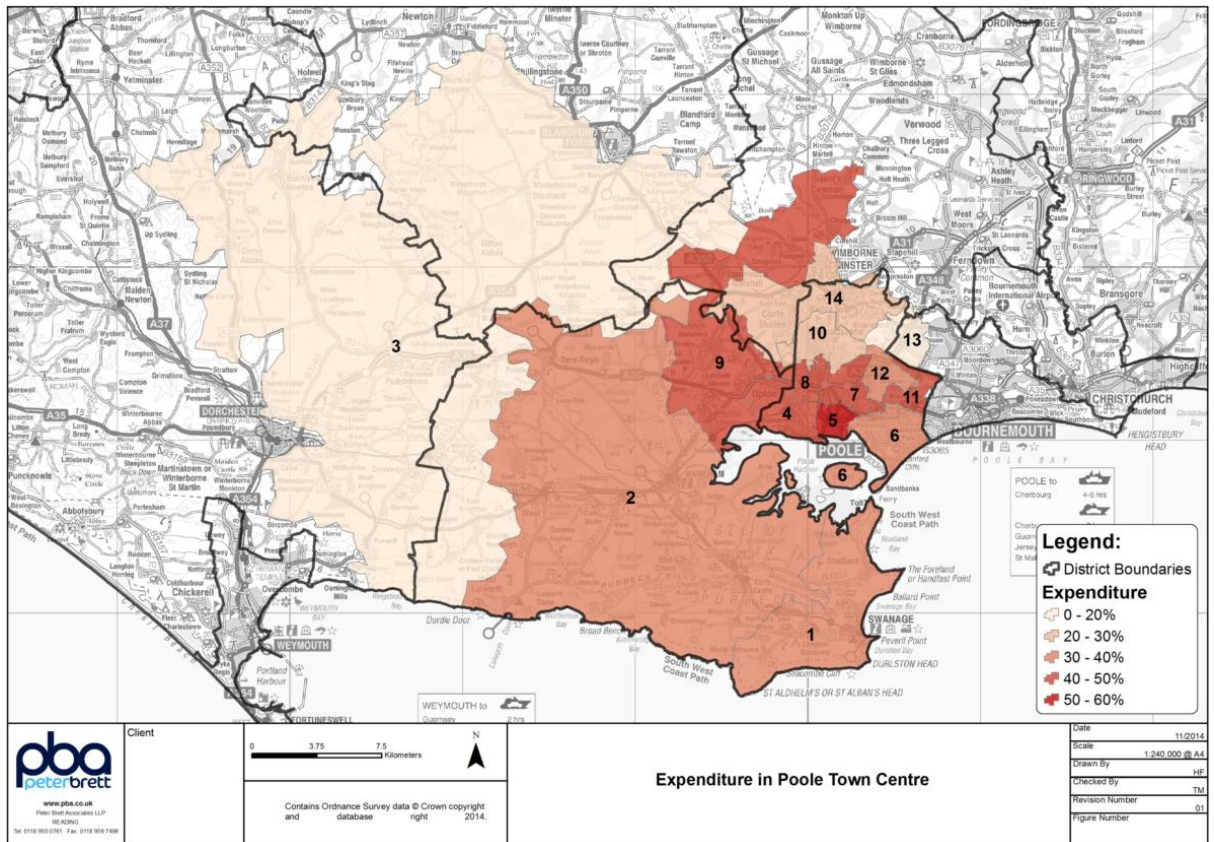


6.4.4 **Figure 6.2** shows the total amount of expenditure retained within each zone on a map. It indicates that zone 5 (Poole town centre), and to lesser extents, zones 1 (Swanage) and 8 (Creekmoor), retain the significant amounts of expenditure within their zone, with zone 5 (which covers Poole Town Centre) understandably retaining the majority of expenditure within its zone. Zone 1 (Swanage) has a high retention rate, partly due to its isolated geography, and zone 8 appears to retain a considerable amount due to having the popular Fleetsbridge industrial park within its boundary. Conversely zones 3 (Puddletown and rural west), 4 (Upton and Hamworthy), 9 (Lytchett Matravers) and 14 (Merley and Corfe Mullen) are relatively poor in retaining expenditure with each section representing 1% of the total or less, but this is understandable due to the lack of comparison shopping areas within these zones.

The influence of Poole town centre

6.4.5 **Table 5.2** identifies that Poole town centre is a key destination for comparison retail amongst survey respondents, being the most popular destination across all zones with the one exemption, zone 3 (Puddletown and rural west). **Figure 6.3** identifies the proportions of expenditure spent within Poole town centre for all zones. As expected due to the lack of proximity, Poole town centre scores poorly from residents in zone 3, with other destinations such as Dorchester identified as a preferred choice. Noticeably, residents in zone 6 (Parkstone and Canford Cliffs) and zone 13 (Bearwood), despite being located relatively close to Poole town centre in zone 5, appear to rate the centre comparatively poorly.

Figure 6.3 Expenditure spent within Poole town centre

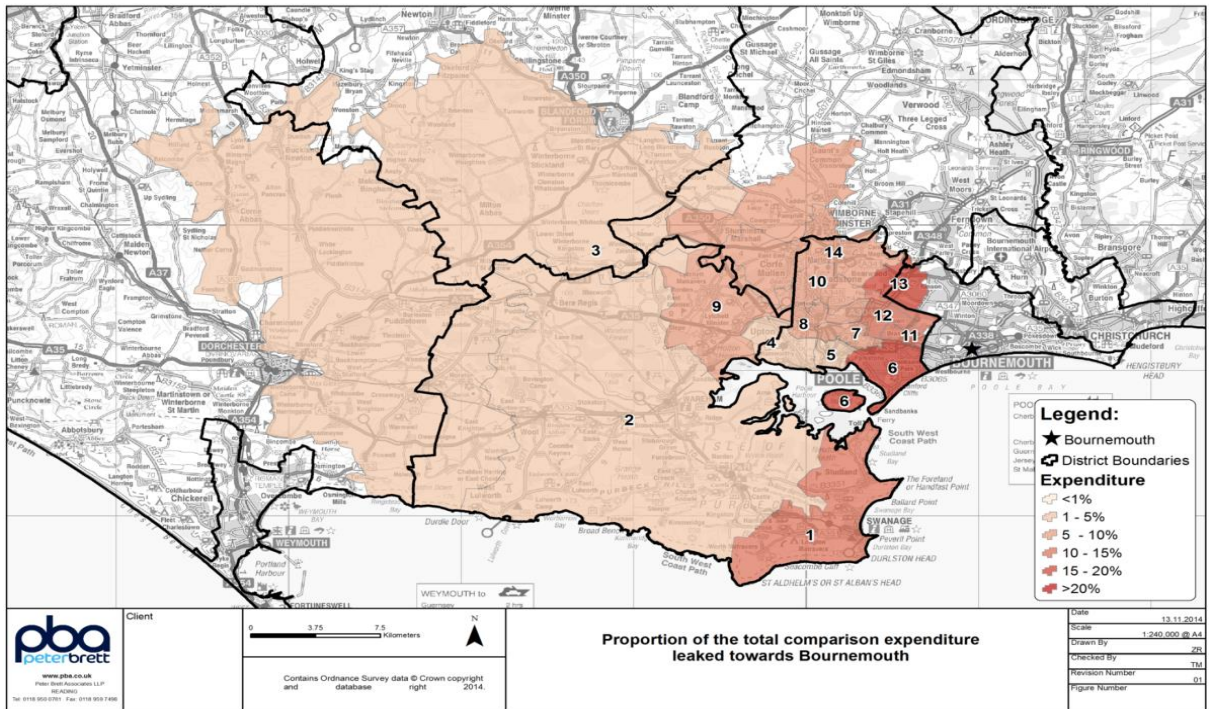


The influence of neighbouring centres

6.4.6 This section considers the roles of other centres outside the study area. **Table T5 Appendix B** highlights that Bournemouth, Wimborne and Dorchester are the three most popular town centres for expenditure leaked outside the study area. That said, on the whole, the influence is comparatively small.

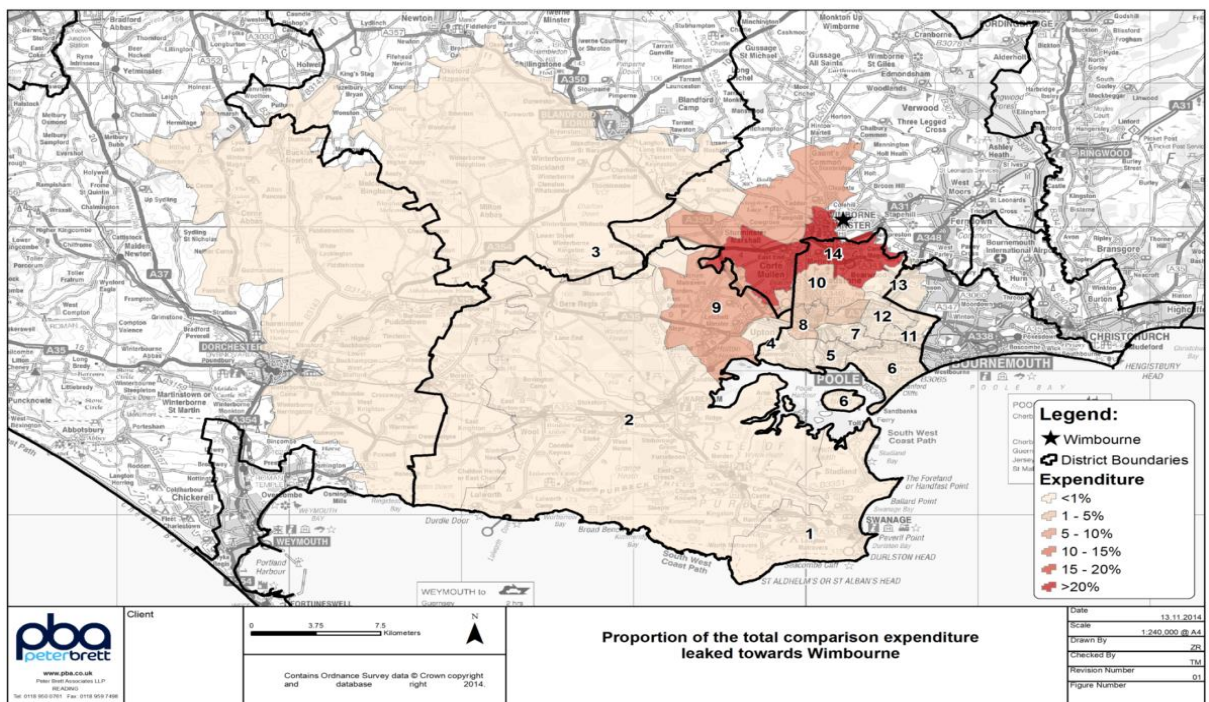
6.4.7 Although Bournemouth town centre, as can be seen in **Figure 6.4**, attracts some expenditure across all zones, the influence is fairly low ranging between 2% and 19%. The survey indicates that in only one area, zone 13 (Bearwood), Bournemouth town centre is preferred to Poole's. Looking at zones 6 (Parkstone and Canford Cliffs) and 13 (Bearwood) in both **Figure 6.3** and **Figure 6.4**, the maps appears to show that the expenditure not spent in Poole town centre is clearly spent within Bournemouth town centre.

Figure 6.4 Expenditure within Bournemouth by zone



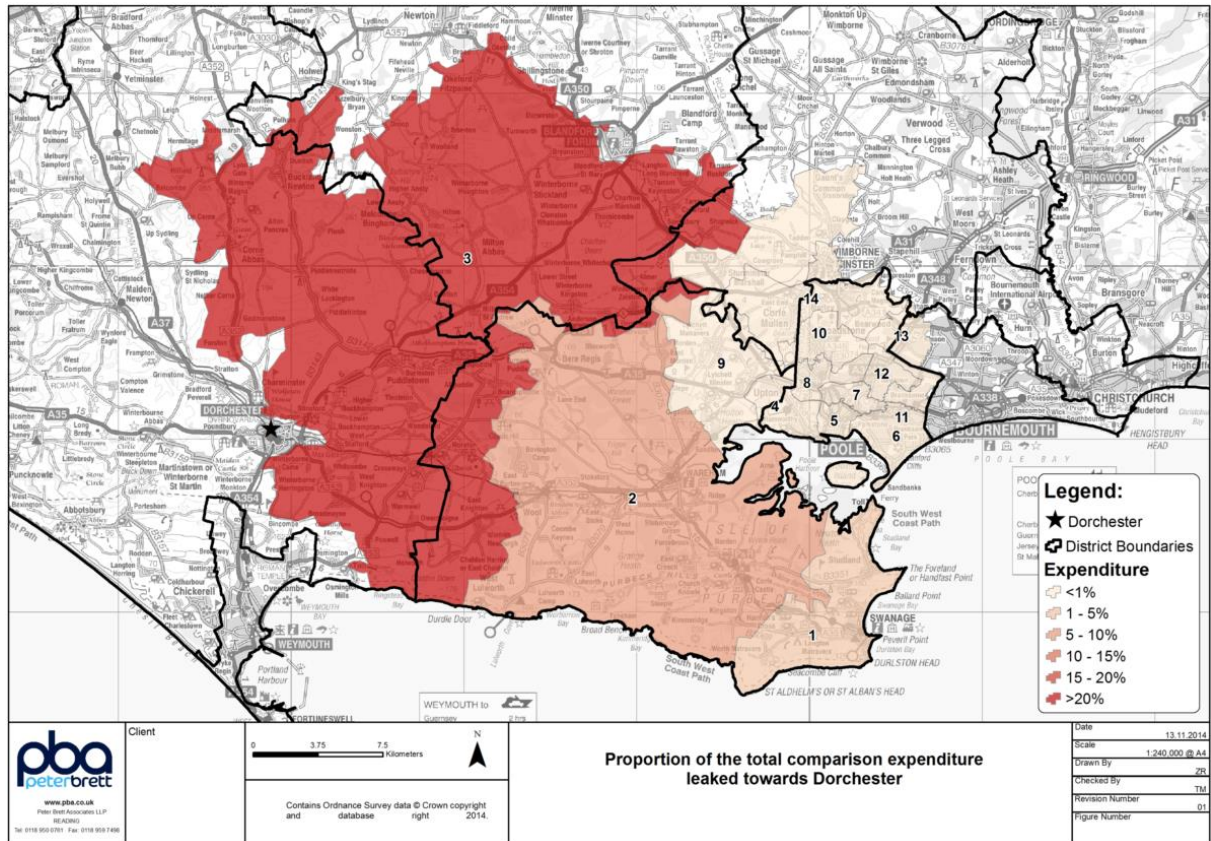
6.4.8 **Figures 6.5 and 6.6** shows the expenditure directed towards Wimborne and Dorchester town centres. Unlike Bournemouth, the expenditure in Wimborne and Dorchester is far less across fewer zones. In terms of Wimborne, the only zone where expenditure is comparable to the expenditure is zone 14 (Merley and Corfe Mullen), where expenditure is 23% compared to 29% in Poole town centre. With the exception of this zone, and of zone 9 (Lytchett Matravers), all the rest have an expenditure proportion of fewer than 5%.

Figure 6.5 Expenditure within Wimborne by zone



6.4.9 In terms of Dorchester town centre, due to its geography, there is a clear preference by residents in zone 3 (Puddletown and rural west), as we would expect, attracting 33% of the retail spend. The town centre is clearly preferred over Poole town centre, which considering the lack of proximity still manages to attract a fairly large proportion (19%). Expenditure by zones within the Borough of Poole account for very small proportions of the total expenditure.

Figure 6.6 Expenditure within Dorchester by zone



6.4.10 The survey identified a number of other centres lying out of the study area that respondents visit for expenditure on comparison items. Southampton, which accounts for 1.2% on average, has a fairly broad, albeit small, representation across each zone ranging between 0.38% and 2.4%. As this is a small proportion it can be concluded that Southampton has a relatively small influence on shopping patterns in the study area. Blandford Forum, which accounts for 1.9%, has a great deal of influence in zone 3 (accounting for 15%) but little else beside.

The role of retail parks

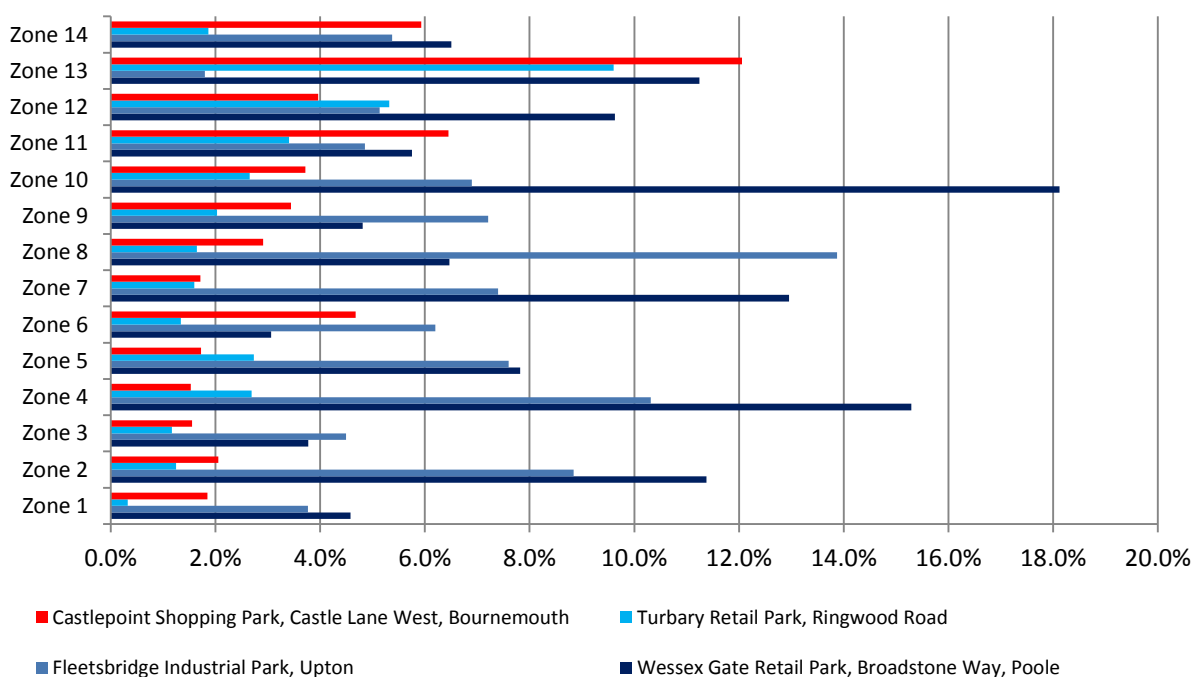
6.4.11 There is a strong representation by retail parks, which make up just over one quarter of the retail expenditure destination. It is therefore worth acknowledging the role retail parks play within the study area. **Table 6.3** notes that the most popular retail parks are as follows with the third most popular retail park, Castlepoint Shopping Park being the only one that falls outside of the study area.

Table 6.3 Expenditure in the most popular retail parks

Top 4 most popular retail parks according to survey responses	Expenditure (£m's)
Wessex Gate Retail Park, Broadstone Way, Poole	£68.2 (8.7%)
Fleetsbridge Industrial Park, Upton	£51.9 (6.6%)
Castlepoint Shopping Park, Castle Lane West, Bournemouth	£30.7 (3.9%)
Turbary Retail Park, Ringwood Road, Bournemouth	£20.4 (2.6%)

6.4.12 **Figure 6.7** shows the proportion of market share in terms of each zone 1 to 14. As can be seen by the red bar, Castlepoint is the dominant retail park in zones 13 (Bearwood) and zone 11 (Branksome) and also a significant influence in zone 14 (Merley and Corfe Mullen). Wessex Gate, which is located within in zone 7, has a broad influence across all zones and is the main location for retail park expenditure in the majority of locations (zones 1, 2, 4, 5, 10, 12 and 14).

Figure 6.7 Expenditure in the most popular retail parks



Spending patterns by goods

6.4.13 **T6 in Appendix B** breaks down the total expenditure of different categories of comparison goods in each zone, whilst T7a to T7n give details of each specific category. Table 6.4 gives a summary of the main points from these tables, showing the total available spend on comparison goods by sub-category in both and across the study area and the top 3 spend destinations of all residents (zone 1-14).

Table 6.4 Comparison Sub-category Spend

Category	Resident expenditure	Top 3 destinations excluding SFT			Retention rate excluding SFT
		1st	2nd	3rd	
Clothing & footwear	£195.7m	Poole Town Centre (£90.1m, 46%)	Bournemouth (£36.4m, 19%)	Castle Point Shopping Park, Bournemouth (£18m, 9%)	56%
Furniture, carpets & soft furnishings	£93.4m	Poole Town Centre (£21.4m, 23%)	Wessex Gate Retail Centre (£14.4m, 15%)	Fleetsbridge Industrial Park (£7.4m, 8%)	72%
DIY & decorating goods	£37.7m	Fleetsbridge Industrial Park (£8m, 21%)	Wessex Gate Retail Centre (£7.4m, 20%)	Poole Town Centre (£6.8m, 18%)	85%
Electrical items & domestic appliances	£197.8m	Poole Town Centre (£46.6m, 24%)	Wessex Gate Retail Centre (£39.4m, 20%)	Fleetsbridge Industrial Park (£27.7m, 14%)	76%
Health, beauty or chemist items	£20.7m	Poole Town Centre (£7.9m, 38%)	Bournemouth (£1.1m, 5%)	Dorchester (£1.1m, 5%)	71%
Recreation, sport & leisure goods	£106.3m	Poole Town Centre (£38.4m, 36%)	Ringwood Road, retail Park (£9.7m, 9%)	Bournemouth (£8.9m, 8%)	70%
Specialist items*	£135.3m	Poole Town Centre (£57.6m, 43%)	Bournemouth (£14.3m, 11%)	Dorchester (£11m, 8%)	61%

Source: NEMS Household Survey and PBA analysis 2014

* Specialist goods include books, CDs, jewellery and gifts

- 6.4.14 The highest spend categories are ‘Clothing and footwear’ and ‘Electrical Items & Domestic Appliances’ with £195.7m and £197.8m of the total resident spend respectively. Poole town centre is a clear favourite across all categories, with the exception of ‘DIY & decorating goods’, where as expected, bulky goods retail parks such as Fleetsbridge Industrial Park and Wessex Gate are preferred.
- 6.4.15 The ‘Clothing and Footwear’ category has the lowest retention rate, at 56%, with a large proportion of expenditure in Bournemouth, in the Town centre (19%) and Castle Point Shopping Park (9%).

6.5 Future spend on convenience goods

- 6.5.1 We also assess growth in retail expenditure for convenience goods across each zone. **T9** in **Appendix B** demonstrates the expected growth in per capita expenditure in convenience goods over the period. Similar to our analysis of comparison goods, the expenditure has been projected forward in accordance with Experian’s Retail Planner Briefing Note 12, and as can be seen in the table is expected to rise by 13.7% between 2014 and 2031.
- 6.5.2 **T10** in **Appendix B** multiplies the population forecasts discussed in the previous section (in **Table 1** of **Appendix B**) with the per capita expenditure forecasts in **T9**. It shows that, having made allowance for ‘special forms of trading’ (such as online shopping, and using SFT discount rates set out in Experian Retail Planner Briefing Note 12), there is currently in 2014 £509.4m of comparison goods expenditure available to residents in the catchment area. This will increase over the course of the study period as shown in **Table 6.5**. Overall, convenience goods expenditure is expected to increase by £102.5m by 2031 (accounting for SFT).

Table 6.5 Convenience goods expenditure growth in study area

	2014	2019	2024	2029	2031
Total convenience goods expenditure, inc SFT deduction (£m)	£509.4	£523.2	£570.5	£601.0	£611.9

Source: Table 3, Appendix B

6.6 Patterns of convenience goods spending

- 6.6.1 The household telephone survey also sought information on convenience goods shopping across the study area. Convenience goods shopping is generally a more localised activity, although residents are sometimes prepared to travel further afield if they have preference for a particular supermarket brand or a lack of choice locally.
- 6.6.2 **T11b** of **Appendix B** shows that of the £509.4m convenience goods expenditure available to residents in the study area, £428.6m is spent within the study area and £80.81m is spent outside the study area. This is equivalent to a retention rate of 84%.

Spending patterns by zone

- 6.6.3 Similar to our analysis of comparison retail, spending patterns are not uniform across the study area. **Table 6.6** summarises where residents in each part of the study area are undertaking their convenience goods spending.

Table 6.6 Summary of convenience goods spending patterns by zone

Zone	Principal convenience goods shopping destination	Summary of patterns of spending
Zone 1: Swanage	Co-op, Swanage	<ul style="list-style-type: none"> ▪ Residents in zone 1 generate a total £23.1m in convenience expenditure. ▪ A significant proportion, £15.46m (67%), is retained within zone 1 ▪ £22.28m (96%) is retained within the study area. The most popular destination in the study area for convenience spend is the Co-Op in Swanage, accounting for £8.9m (38%) of the total spend. ▪ Outside of zone 1, the most popular destination for convenience retail is at Sainsbury's in neighbouring Wareham which attracts £1.79m, approximately 8% of the total spend. In third place is Asda in Canford Heath attracting £1.37m (6%). ▪ £0.85m (4%) is leaked to locations outside of the study area, of which Marks and Spencers (Westbourne) is the most popular destination attracting £0.15m (1%).
Zone 2: Wareham	Sainsburys (Wareham)	<ul style="list-style-type: none"> ▪ Residents in zone 2 generate a total £41.4m in convenience expenditure. ▪ £12.58m (30%) is retained within zone 2 and £35.56m (86%) is retained within the study area. ▪ The most popular destination in zone 2, and the entire study area as a whole, is Sainsbury's (Wareham) accounting for £6.89m (17%) of the total spend. ▪ However, close behind Sainsbury's, Tesco Extra on Fleets Corner is the second most popular with £6.66m (16% of the total expenditure) and Asda on West Quay road attracting £6.3m (15%). ▪ £5.87m (14%) is leaked to locations outside of the study area, of which Dorchester is the most popular destination attracting £1.28m (3%).
Zone 3: Puddletown and rural west	Tesco (Blandford Forum)	<ul style="list-style-type: none"> ▪ Residents in zone 3 generate a total £56.3m in convenience expenditure. ▪ £20.12m (36%) is retained within zone 3 ▪ Only £30.07m (53%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco (Blandford Forum) accounting for £9.27m (16%) of the total spend. ▪ A significant proportion, £26.23m (47%), is leaked to locations outside of the study area, of which Dorchester is the most popular destination attracting £5.54m (10%), due to its close proximity to the study area. Much of the rest is dispersed around a range of smaller centres rather than one larger centre.
Zone 4: Upton &	Tesco Extra (Fleets Corner,	<ul style="list-style-type: none"> ▪ Residents in zone 4 generate a total £39.3m in convenience

Zone	Principal convenience goods shopping destination	Summary of patterns of spending
Hamworthy	Poole)	<p>expenditure.</p> <ul style="list-style-type: none"> ▪ £9.11m (23%) is retained within zone 4 ▪ Significantly, £38.24m (97%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco Extra (Fleets Corner, Poole) accounting for £12.16m (31%) of the total spend. ▪ Only £1.05m (3%) is leaked to locations outside of the study area, of which Asda (Southampton) is the most popular destination.
Zone 5: Poole Town Centre	Aldi (Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 5 generate a total £22.6m in convenience expenditure. ▪ £16.19m (72%) is retained within zone 5 ▪ Significantly, £22.17m (98%) is retained within the study area. The most popular destination in the study area for convenience spend is Aldi (Poole) accounting for £3.41m (15%) of the total spend. ▪ Only £0.44m (2%) is leaked to locations outside of the study area, of which Wimborne is the most popular destination.
Zone 6: Parkstone and Canford Cliffs	Tesco (Branksome, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 6 generate a total £54.2m in convenience expenditure. ▪ £6.73m (12%) is retained within zone 6 ▪ Significantly, £48.83m (90%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco (Branksome, Poole) accounting for £10.61m (20%) of the total spend. ▪ Only £5.37m (10%) is leaked to locations outside of the study area, of which Marks and Spencer's (Westbourne) is the most popular destination attracting £2.18m (4%).
Zone 7: Oakdale	Tesco Extra (Fleets Corner, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 7 generate a total £35.7m in convenience expenditure. ▪ £4.57m (13%) is retained within zone 7 ▪ Significantly, £34.42m (96%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco Extra (Fleets Corner, Poole) accounting for £6.8m (19%) of the total spend. ▪ Only £1.27m (4%) is leaked to locations outside of the study area, of which Tesco (Westbourne) is the most popular destination.
Zone 8: Creekmoor	Asda, (Canford Heath)	<ul style="list-style-type: none"> ▪ Residents in zone 8 generate a total £31m in convenience expenditure. ▪ £11.09m (36%) is retained within zone 8 ▪ Significantly, £29.49m (95%) is retained within the study area. The most popular destination in the study area for convenience spend is Asda, Canford Heath accounting for £6.71m (22%) of the total spend. ▪ £1.54m (5%) is leaked to locations outside of the study area,

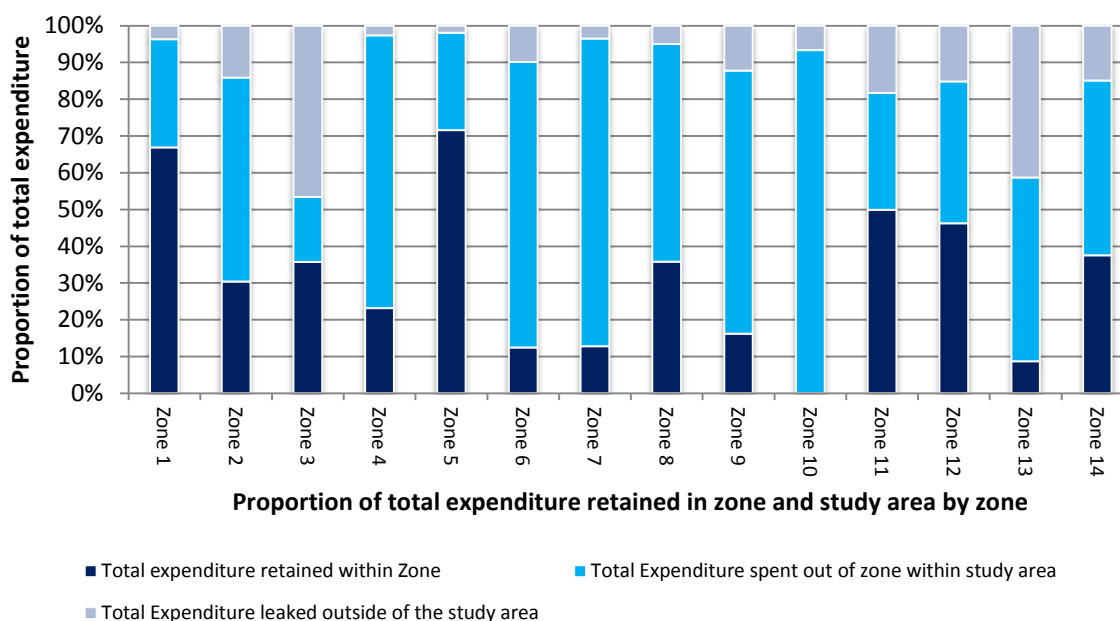
Zone	Principal convenience goods shopping destination	Summary of patterns of spending
		of which Wimborne is the most popular destination attracting £0.72m (2%).
Zone 9: Lytchett Matravers	Tesco Extra, (Fleets Corner, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 9 generate a total £17.3m in convenience expenditure. ▪ £2.79m (16%) is retained within zone 9 ▪ £15.16m (88%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco Extra, (Fleets Corner, Poole) accounting for £2.89m (12%) of the total spend. ▪ £2.12m (12%) is leaked to locations outside of the study area, of which Blandford Forum is the most popular destination attracting £0.3m (2%).
Zone 10: Broadstone	Tesco Extra, (Fleets Corner, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 10 generate a total £40.5m in convenience expenditure. ▪ £10.62m (26%) is retained within zone 10 ▪ Significantly £37.81m (93%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco Extra (Fleets Corner, Poole) accounting for £9.47m (22%) of the total spend. ▪ Only £2.7m (7%) is leaked to locations outside of the study area, of which Lidl (Bournemouth) is the most popular destination attracting £1.08m (3%).
Zone 11: Branksome	Sainsbury's (Alder Rd, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 11 generate a total £34.4m in convenience expenditure. ▪ There is minimal expenditure (<1%) retained in within zone 11 ▪ £28.09m (82%) is retained within the study area. The most popular destination in the study area for convenience spend is Sainsbury's (Alder Rd, Poole) accounting for £7.5m (22%) of the total spend. ▪ £6.29m (18%) is leaked to locations outside of the study area, of which Aldi (Bournemouth) is the most popular destination attracting £2.52m (7%).
Zone 12: Alderney and Newtown	Tesco (Mannings Heath)	<ul style="list-style-type: none"> ▪ Residents in zone 12 generate a total £31.7m in convenience expenditure. ▪ £14.63m (46%) is retained within zone 12 ▪ £26.86m (85%) is retained within the study area. The most popular destination in the study area for convenience spend is Tesco (Mannings Heath) accounting for £9.11m (29%) of the total spend. ▪ £4.82m (15%) is leaked to locations outside of the study area, of which Aldi (Bournemouth) is the most popular destination attracting £2.13m (7%).
Zone 13: Bearwood	Sainsburys' (Alder Road, Poole)	<ul style="list-style-type: none"> ▪ Residents in zone 13 generate a total £38m in convenience expenditure.

Zone	Principal convenience goods shopping destination	Summary of patterns of spending
		<ul style="list-style-type: none"> £3.31m (9%) is retained within zone 13 £22.31m (59%) is retained within the study area. The most popular destination in the study area for convenience spend is Sainsburys' (Alder Road, Poole) accounting for £7.31m (19%) of the total spend. £15.72m (41%) is leaked to locations outside of the study area, of which Aldi (Bournemouth) is the most popular destination attracting £3.37m (9%).
Zone 14: Merley and Corfe Mullen	Waitrose, (Wimborne)	<ul style="list-style-type: none"> Residents in zone 14 generate a total £43.9m in convenience expenditure. £16.44m (37%) is retained within zone 14 £37.31m (85%) is retained within the study area. The most popular destination in the study area for convenience spend is Waitrose, (Wimborne) accounting for £10.34m (24%) of the total spend. £6.55m (15%) is leaked to locations outside of the study area, of which Wimborne is the most popular destination attracting £2.19m (5%).

Source: T5, Appendix A

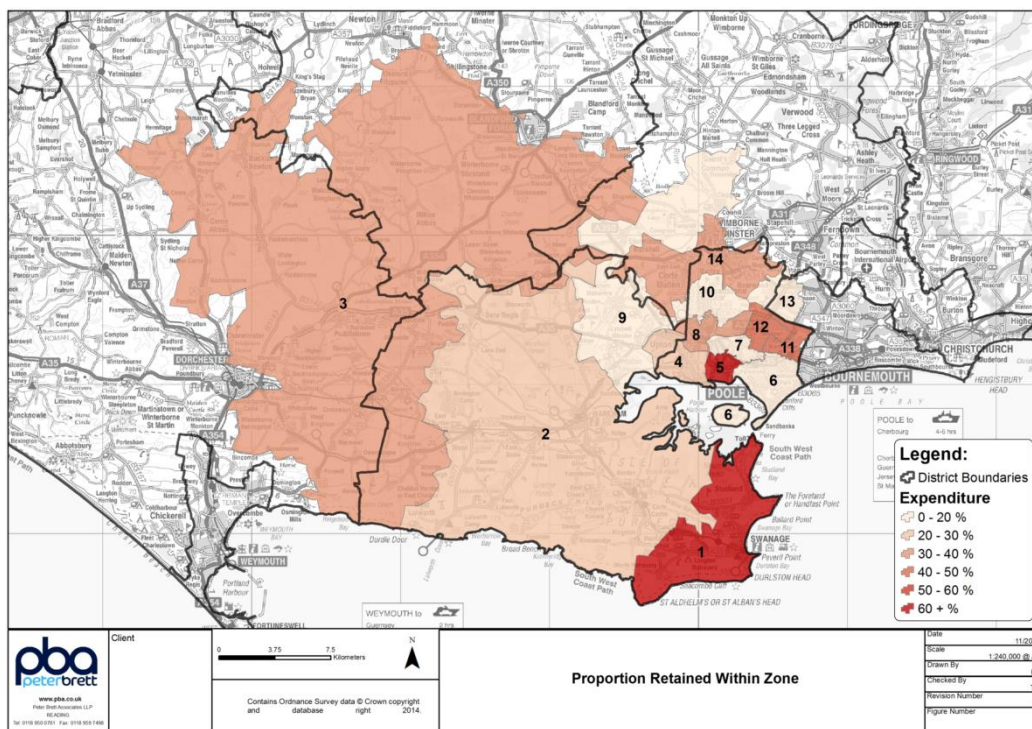
6.6.4 **Figure 6.8** shows how the various zones retain expenditure, both in terms of expenditure retained in their zone and in terms of the study area as a whole. Again, the darker coloured bars show the percentage of expenditure retained in their zone, the middle section shows the expenditure not in the zone but within the study area (zones 1-14) and finally the lighter bars at the top of the chart shows the proportion leaked outside the study area.

Figure 6.8 Summary of convenience goods spending patterns by zone



6.6.5 **Figure 6.8** identifies that in terms of retention of expenditure within each zone, only zones 1 (Swanage) and 5 (Poole Town Centre) perform well with over 50% retention of expenditure. Although at first glance the retention rate in zone 2 looks broadly in line with the study area average, it is worth noting from **Figure 6.9** below, Wareham's more isolated position away from the other areas. Considering the greater distance, it appears that residents in zone 2 (Wareham) are willing to travel considerably further for convenience items as only 30% are shopping within their zone.

Figure 6.9 Convenience expenditure retained in each zone



6.6.6 Zone 6 (Parkstone and Canford Cliffs) retains only 12% of expenditure, despite having a relatively wide range of retailers, with residents instead shopping in zones 7 (Oakdale) (18.6%) and 12 (Alderney and Newtown) (33%), suggesting the quality of retail offer or proximity to other larger stores is a key determinant in spend. Interestingly, despite zone 6's (Parkstone and Canford Cliffs) proximity to Bournemouth, only a relatively small amount is leaked out of the study area. Zone 7 (Oakdale) also has noticeably low retention rates, however, it is also worthy of noting that there are comparatively fewer retailers in this zone, as it borders a number of zones with particularly large retailers, such as in zone 12 (Alderney and Newtown).

6.7 Summary of findings

Borough of Poole - Comparison

- 6.7.1 For comparison goods the study has found that Poole town centre is a considerable draw for customers attracting 34% of the total expenditure. Retail parks also play a significant role in Poole's retail provision particularly Wessex Gate and Fleetsbridge Industrial Park, which attracts 9% and 7% respectively. In terms of local centres, Branksome, (2.4%) Parkstone (1.7%) and Broadstone (1.4%) attract much smaller proportions of expenditure, especially when compared with the retail parks such as Wessex Gate (8.7%) and Fleetsbridge (6.6%).
- 6.7.2 Outside the study area, Bournemouth town centre (9%) and Dorchester (4.5%) provide the main retail alternatives, with Castlepoint Retail Park, Bournemouth (3.9%) also attracting

expenditure. However, as discussed in this section, it is considered that the neighbouring centres are not as influential as is perceived locally.

Borough of Poole - Convenience

- 6.7.3 Zone 5, (Poole town centre), attracts the highest convenience expenditure with 19% (£95.09m) of total expenditure within the study area. It also has the highest retention within a zone (72%)
- 6.7.4 Zone 12 (Alderney and Newtown) attracts marginally less expenditure, £94.19m (18%), and also zone 8 (Creekmoor), which attracts £79.62m (16%).
- 6.7.5 In terms of the best performing stores, the Tesco Extra at Fleets Corner attracts the greatest amount of expenditure at £53.1m, accounting for 10% of the total expenditure in the study area. This is followed by Asda on West Quay Road (£37.6m), Tesco Extra at Yarrow Road (£32.65m) and Sainsbury's at Alder Road (£28.66m) Tesco Extra at Fleets Corner appeared the most popular in 4 of the 14 zones (zones 4, 7, 9 and 10), whilst Sainsbury's at Alder Park was most popular in 2 out of 14 (zones 11 and 13).
- 6.7.6 Of the expenditure leaked beyond the boundary of the study area, there does not appear to be one large dominant store, rather a number of stores all attracting between £2m and £3m. The Aldi (Bournemouth) is perhaps the one notable exemption to this attracting £8.02m although this only equates to 1.6% of the total spend.

Purbeck District - Comparison

- 6.7.7 For comparison goods, residents in Swanage retain less than a quarter (24%) within their zone, with the majority being spent in Poole town centre. Despite its proximity, less than 2% is spent in neighbouring Wareham where the retail offer is similar to Swanage, with shoppers travelling further afield to retail parks such as Wessex Gate (5%) and Fleetsbridge (4%). Poole town centre attracts approximately one third of total spend by residents in zone 1 (Swanage). Bournemouth town centre is popular accounting for nearly 11%, albeit not preferred over Poole town centre. Of the total comparison spend within Swanage (Zone 1), 92% of this is comprised of residents within the zone highlighting that the location is not particularly popular with other areas within the study area.
- 6.7.8 Wareham (Zone 2) also retains only a small amount of comparison expenditure (5%), which supports the findings of the health checks that noted an apparent deficiency in comparison retailers. Instead, Poole town centre attracts 35% of the expenditure from residents in Zone 2, with Wessex Gate retail park (11.4%) and Fleetsbridge retail park (8.8%) also very popular, with considerable amounts also leaked outside to areas such as Dorchester (8.8%) and Bournemouth (5.4%).

Purbeck District - Convenience

- 6.7.9 A key finding of the survey is that only 30% of convenience retail is spent by Wareham (Zone 2) residents within their zone. As convenience expenditure is normally more localised, these figures show that many Wareham residents are choosing to purchase convenience goods elsewhere. For instance, only marginally more is spent in the main convenience store within Wareham at Sainsbury's (£6.89m, 16.6%) than in Tesco Extra at Fleets Corner, Poole (£6.66m 16.1%) or Asda, West Quay Road, Poole (£6.3m, 15.2%) which are both considerably further away. Of the total expenditure in Wareham itself (Zone 2), 81% is spent by residents from within the zone, with much of the remainder spent by residents from zone 1 (Swanage).
- 6.7.10 Swanage has a high retention of convenience expenditure (67%), the largest proportion outside of Zone 5 (Poole town centre). In terms of the limited offer and choice of retailers the level of retention is surprising high. However it is relatively isolated and the distance to travel to alternative locations would be a limiting factor to leakage. It is also of note that when looking

at responses to the survey in respect of online shopping that Zone 1 Swanage and Zone 2 Wareham scores the highest levels within the study area at around 10%, compared with 2% in zone 5 (Poole town centre).

7 Need for retail floorspace

7.1 Introduction

7.1.1 In the previous section we set out the current patterns of retail spending in the study area, based on the findings of the household telephone survey of shopping patterns. Having considered this, in this section we set out the 'need' for additional retail floorspace over the course of the study period to 2031, having regard to both quantitative capacity forecasts) and qualitative observations. At the outset we emphasise that capacity forecasts should be subject to regular review throughout the Council's Plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. We also advise that longer-term quantitative forecasts set out in this assessment (post-2021) should be treated as indicative. This is because of the exponential shape of the expenditure growth - in other words the further into the future, the greater the rate of growth, hence caution should be exercised beyond the next 5-10 years.

7.2 Assessment of quantitative retail need

7.2.1 Quantitative need is projected for floorspace over five year periods 2014, 2019, 2024, 2029 and 2031.

7.2.2 The methodology for undertaking the quantitative assessment is based upon the following:

- Step 1: assess the existing level of population and existing volume of retail expenditure of those residents within study area, deducting an appropriate proportion for special forms of trading (SFT)
- Step 2: apply forecasts of population change and per capita expenditure growth, in order to establish the overall level of projected growth in expenditure for residents of the study area over the period to 2031
- Step 3: establish where the expenditure of the residents of the study area is currently spent, using the market shares of the 2014 NEMs household telephone survey (as described in Section 5)
- Step 4: make allowance for 'claims' on the growth in retained expenditure as a result of:
 - floorspace efficiency change (that is the growth in turnover for existing retailers within existing floorspace)
 - commitments to new floorspace (either schemes under construction or extant permissions that would result in additional retail floorspace)
- Step 5: make an allowance for tourism expenditure in the study area which is directed to comparison and convenience outlets
- Step 6: calculate the amount of surplus residual expenditure that is potentially available to support new retail floorspace development, assuming a constant market share scenario (based on steps 2-5 above) and convert this expenditure to new floorspace requirements
- Step 7: develop alternative scenarios for calculating growth in residual expenditure, including applying sensitivity assessments, if appropriate.

7.2.3 The assessment of quantitative need is set out in Tables 1-12 which are produced in full in **Appendix B** of this report. These tables are referred to within the text to draw out the main findings.

7.2.4 There following data inputs are used to complete the quantitative assessment:.

Population

7.2.5 The population for each zone, and projections to 2014, 2019, 2024, 2029 and 2031, are derived from Experian’s Micromarketer Generation model (MMG3), and split on a zone by zone level using Mapinfo’s Anysite GIS system.

7.2.6 Between 2014 and 2031 the study area population, is forecast to increase from 256,877 to 288,589, representing a 12.3% increase.

Expenditure

7.2.7 Estimates of the available per capita expenditure of residents of the study area is also derived from MMG3, and split on a zone by zone level using Mapinfo’s Anysite GIS system. The spending estimates are bespoke to each zone of the study area and are combined with the population estimates to generate the total forecast expenditure in the study area. Expenditure estimates are forecast to 2031 based upon the following growth rates.

Table 7.1 Experian Forecast Growth Rates: Comparison & Convenience | Spend

Year	Comparison goods	Convenience goods
2014	5.6%	-0.5%
2015	4.4%	0.5%
2016	3.1%	0.4%
2016 and beyond	3.3% per year	0.6% per year

Source: Experian Retail Planner Note 12 (October, 2014)

Sales density growth

7.2.8 Sales density growth (also known as floorspace productivity growth) is the amount of expenditure required to increase the productivity (or turnover) of existing floorspace on a year by year basis. Allowances for sales density growth are linked to expenditure growth; **Table 7.2** summarises the expenditure growth rates we have used for our study. It should be noted that, owing to the low forecast levels of expenditure growth for the convenience goods sector, we do not forecast any sales density growth in this sector until 2016 and beyond.

Table 7.2 Sales density growth rates

	Comparison goods sales density growth (% per annum)	Convenience goods sales density growth (% per annum)
To 2016	1.7%	0%
2016 onwards	1.7%	0.3%

Source: T6 and T7, Appendix B

Special Forms of Trading (SFT)

- 7.2.9 The study anticipates increasing amounts of expenditure on SFT, most notably related to internet purchases, which will impact upon the total expenditure available for in-store purchases. Forecasts are derived from the Experian Retail Planner Briefing Note 12 (October 2014). For comparison goods this equates to an 11.7% market share across the UK for SFT in 2014 rising incrementally to 15.5% in 2031. For convenience expenditure, SFT equates to 2.6% in 2014 with limited growth to 5.6% in 2031. The limited growth in convenience SFT reflect Experian's 'adjusted' estimates which take into account the proportion of online food shopping sales which is sourced from existing stores.

Current Patterns of Spending

- 7.2.10 The patterns of spending, as described in Section 5, are used to inform where future growth in expenditure may accrue. Our forecasts of future requirements assume a static pattern of retail expenditure, based upon the 2014 telephone survey results

Planning Commitments

- 7.2.11 Data provided by the Borough of Poole and Purbeck District council states that there are a number of planning applications that have been received that are not yet completed but shall likely have an impact on the future level of floorspace within Poole and Purbeck. This is summarised in Table 7.3 which relates to commitments in Poole and Table 7.4 for Purbeck. In total, across the two locations we understand that there is expected to be approximately 2,379sq.m of new comparison floorspace and 2,059 sq.m of convenience.

Table 7.3 Outstanding Commitments: Poole

Reference	Location	Decision	Notes
APP/09/00066/F	Falkland Square, Poole, BH15 1ER	11/05/2009	net increase of 1148.7 sq.m of comparison retail floorspace
APP/10/01036/P	36 Panorama Road, Poole, BH13 7RD	02/09/2011	net increase of 446.3 sq.m of comparison retail floorspace
APP/11/00467/F	5 & 5a Moor Road, Broadstone, BH18 8AZ	14/11/2011	net increase of 39 sq.m of comparison retail floorspace
APP/13/01096/F	44 Haven Road, BH13 7LP	04/11/2013	net increase of 28 sq.m of comparison retail floorspace
APP/13/01606/F	Units 37, 38 & 39, Dolphin Centre, High Street, BH15 1SZ	03/03/2014	net increase of 218 sq.m of comparison retail floorspace
APP/12/00148/F	200 Blandford Road, BH15 4BH	05/07/2012	net increase of 778 sq.m of convenience retail floorspace
APP/11/01246/P	Pilkingtons Tiles Ltd, Blandford Road, BH15 4A2	11/12/2012	net increase of 440 sq.m of convenience retail floorspace
APP/12/01318/F	499-517 Ashley Road, BH14 0BD	16/01/2013	net increase of 403 sq.m of convenience retail floorspace

APP/09/00039/F	Land to the north of Kinson Pottery Estate, Ringwood Road, Poole Dorset.	18/05/2009	net increase of 97.5 sq.m of convenience retail floorspace
APP/10/01021/F	3 Dorset Lake Avenue, Poole, BH14 8JD	22/08/2011	net increase of 109 sq.m of convenience retail floorspace
APP/13/01035/F	Dovey Premium Products Ltd, DPP House, 498 Blandford Road, 498 Blandford Road, BH16 5BN	29/11/2013	net increase of 200 sq.m of convenience retail floorspace

Table 7.4 Outstanding Commitments: Purbeck

Reference	Location	Decision	Notes
6/2010/0271	44 46 48 & 48a High St, Swanage	25/06/2012	net increase of 75 sq.m of Convenience retail floorspace and 188 sq.m of Comparison retail floorspace
6/2012/0382	High Street (14 - Candleworld), Swanage	14/08/2012	net decrease of 85 sq.m of Comparison retail floorspace
6/2013/0225	Greenridge Public House	16/07/2013	net increase of 64 sq.m of Convenience retail floorspace and 160 sq.m of Comparison retail floorspace

Tourism Expenditure

7.2.12 The methodology for assessing tourist visitor expenditure in the study area utilises survey data from the Economic Impact of Dorset's Visitor economy report¹⁰ to identify the total spend of tourists on shopping. The study calculates that the annual visitor expenditure in Poole is just over £41m and just under £32m for visitors to Purbeck. This study has made an estimate that 80% of shopping spend by tourists will be on comparison goods and 20% on convenience (noting that spend in cafes, restaurants and bars is considered to be a source of leisure spending). This spend is then grown using the catchment per head forecasts (set out above) to allow for increases in tourism spend levels per head and then added to the existing available spend within the study area.

¹⁰ The Economic Impact of Dorset's Visitor Economy The South West Research Company Jan (2014)

7.3 Findings in relation to quantitative retail floorspace requirements

Convenience Floorspace

- 7.3.1 The quantitative need for convenience goods is summarised in Table 7.5 below and in detail in **T8**, **T11** and **T13** in **Appendix B**. The analysis is based upon a static aggregate retention level of 81.1% from the study area. Each column of the need tables e.g. 2014-19 shows the amount of floorspace which is needed in that period, i.e. the figures are not cumulative. The total over the study timeframe (2014-31) is shown in the far right column (which is the aggregate of the four periods), giving a requirement of 3,167 sqm net.

Table 7.5 Convenience Floorspace Requirements 2014-2031

	2014-2019	2019-2024	2024-2029	2029-2031	Total 2014-2031
Convenience floorspace (sqm net)	-1401	2,603	1,465	499	3,167

Comparison Floorspace

- 7.3.2 Table 7.6 sets out the comparison floorspace need for a static aggregate retention level of 69% (i.e. it is assumed that the comparison goods expenditure retention will remain at current levels). Again, each column of the need table e.g. 2014-19 shows the amount of floorspace which is needed in that period. The four periods give an aggregate requirement of 40,498 sq. m net between 2014 and 2031.

Table 7.6 Comparison Floorspace Requirements 2014-2031

	2014-2019	2019-2024	2024-2029	2029-2031	Total 2014-2031
Comparison floorspace (sqm net)	6,430	12,449	14,892	6727	40,498

- 7.3.3 This assessment assumes that a national average figure is used to account for SFT as provided by Experian. However, an alternative approach that uses a locally derived figure can also be used as the household survey also recorded shopping patterns relating to SFT purchases. Table 7.7 sets out the results of applying a locally based figure. The locally derived figure has been adjusted at the same rate as Experian to take into account store based purchases via SFT (e.g. the order that is made online is actually sourced from a local store, rather than a warehouse). As the survey is a point in time it has been necessary to grow the rate at the same levels set out by Experian.

Table 7.7 Locally adjusted SFT rates – Comparison & convenience floorspace 2014-2031

	2014-2019	2019-2024	2024-2029	2029-2031	Total 2014-2031
Convenience floorspace (sqm net)	1,131	2,877	1,639	579	3,963
Comparison floorspace (sqm net)	4,220	11,047	13,892	6,449	35,608

7.3.4 When using the locally derived figure, Table 7.7 shows that within the study area there is less need for comparison floorspace as shoppers are using more non store based outlets, however in terms of convenience shopping the floorspace requirements are greater as locally people are shopping more in store than the national average. When recommending a plan target for retail floorspace it is important to consider local circumstances that may differ from the national norm.

7.4 Assessment of qualitative need

7.4.1 Both the NPPF and the PPG are silent on the weight to be attached to qualitative retail floorspace needs, and how such needs should be assessed. We therefore revert back to the guidance in the preceding CLG Practice Guidance, which advises that qualitative factors to take into account include identifying gaps in local provision; consumer choice and competition; over-trading; 'location-specific issues', and quality of existing provision. Below we therefore present a discussion of these criteria, which largely overlap with one another, informed by our health check assessments of the town centres (**Section 4**) and our review of the current patterns of shopping (**Section 5**).

Over-trading of floorspace

7.4.2 'Over-trading' refers to the both the performance of centres and stores within a catchment when related to 'benchmark' (i.e. expected) turnovers, as well as more qualitative indicators such as overcrowding and congestion in stores. It is therefore both a quantitative and qualitative indicator of need.

7.4.3 For convenience goods floorspace, we have undertaken a detailed trading assessment of each of the principal foodstores in the District, and compared their trading performance with an expected 'benchmark' turnover (that is, the turnover the store would be expected to achieve if trading at company average turnover per sqm rates). Although this exercise is reliant on the use of operator average data in terms of the split between convenience and comparison goods floorspace within the stores (except in some stores where we have adjusted this based on our own estimate of sales mix), and is based on national average sales densities, it nevertheless provides a robust, and industry-accepted, method of assessing current trading performance. Assumptions of store floorsize's have been derived from Nathaniel Lichfield and Partners Retail and Leisure Capacity study update 2007, Appendix 1A.

7.4.4 Our assessment of foodstore trading performance is set out at **Table 7.8**. Stores throughout the study area appear to show a variance in trade, with some such as Asda on West Quay Road and Tesco Extra at Fleetsbridge over trading significantly, whilst Sainsbury's at Pitwines Close a short distance from the ASDA appears to be under trading by a large extent.

- 7.4.5 The Cooperative in Swanage and the Sainsbury in Wareham are also over trading, which is not surprising given they are the only larger stores in each of those areas.

Table 7.8 Over-trading and Under-trading analysis

Store	NEMs survey derived Turnover (2014)	Benchmarks Turnover	Over-trading / Under-trading
Asda, West Quay Road	£37.60	£29.03	Over-trading
Sainsbury's, Pitwines Close	£15.96	£31.00	Under-trading
Waitrose, Parkstone,	£15.12	£22.41	Under-trading
Tesco Extra, Poole Fleets Corner Extra	£53.10	£35.24	Over-trading
Tesco Extra, Yarrow Road, Mannings Heath	£32.65	£38.36	Under-trading
Sainsbury's, 4 Alder Park, Alder Road	£28.66	£37.05	Under-trading
Sainsbury's, South Street, Wareham	£9.12	£7.10	Over-trading
Co-operative, Swanage	£9.24	£4.53	Over-trading

- 7.4.6 Whilst there is a mix of over and under trading in Poole, there is more under trading overall suggesting that there is adequate provision of convenience floorspace within Poole. However, within Purbeck there is more of an issue with over trading of current stores, suggesting that there is need for more convenience floorspace.

7.5 Deficiencies in provision and consumer choice

- 7.5.1 Gaps in provision are ultimately subjective; what one particular shopper may consider a gap in provision may not be of particular concern to another. Ultimately, centres need to be able to meet as many day-to-day shopping needs of local residents as possible, to help minimise expenditure leakage and promote sustainable patterns of shopping.

Poole

- 7.5.2 **Comparison** - Our health check assessment and the results of the household survey indicate that Poole town centre generally does a good job of meeting residents' comparison goods shopping needs. It draws a strong market share from most of the survey zones, and is the dominant comparison goods shopping destination for all but two of the zones (3 & 14). Its influence over shopping patterns lessens in the west half of the study area as residents in these areas benefit from good proximity to Dorchester and in the north east, who tend to turn to Bournemouth. As our study has identified, Dorchester has already had recent investment, in particular its leisure offer and Bournemouth also has plans to improve its town centre. Whilst market share of Poole is currently strong there is potential to lose out to these areas in the future. Poole cannot be complacent therefore; ongoing upgrading of its retail offer - including the modernisation of existing floorspace - will need to take place throughout the Plan period to ensure it retains its popularity as a comparison goods shopping destination.
- 7.5.3 The Dolphin Centre ground floor units are generally large (when compared with the rest of the town centre) and the centre is well-connected with the surrounding retail offer and public transport networks. The upper areas are not successful and require a change in approach to improve occupancy and sales density.
- 7.5.4 Poole High Street, whilst historically the main thoroughfare, is in need of investment and upgrading of many of its units, in order to remain competitive and an integral part of the town centre. Some of the units in this location are low-grade retail and other uses (such as money

lending and so on). Many units are on the small side. The improvement in the quality of the retail offer along the High Street is therefore considered to represent both a priority and an opportunity for the Council over the course of the study period in order to cement Poole's currently-strong trading position; whilst we have not assessed land ownership in this area, it is considered that amalgamation of units to increase their attractiveness to the retail market should be reviewed as an option.

- 7.5.5 The fashion offer of Poole town centre is not wide, with a domination of low to mid-market retailers such as Peacocks, New Look, Next and so on and a lack of higher mid market and high end fashion stores, such as Whitestuff, Gap, Jack Wills etc. There is little to distinguish the retail offer from that of competing centres, and the attraction of a greater variety of mid-to-upper market retailers to the centre (examples might include Zara, Pull & Bear and White Company) will help to 'shore up' the retention rate in the medium to long term and fend off the risk of further market share being lost to Bournemouth and Dorchester. Generally speaking, retailer demand is linked to quality of provision; with the development of modern, larger-floorplan retail floorspace (which could involve the modernisation / amalgamation of existing retail premises), we would expect that there is scope for further retailers to be attracted to the town centre, particularly if opportunities are provided within/adjacent to the existing primary shopping area.
- 7.5.6 We have established that the local centres in Poole do not act as significant comparison goods shopping destinations in their own right. However, they play an important role in meeting local shopping needs and therefore their function as comparison goods shopping destinations should continue to be supported. These centres do not compete with Poole per se, but rather offer a complementary role. There are gaps in the retail offer - none of the centres have particularly strong clothing & footwear provision for example - but unless the Council wishes for the centres to operate at a higher position in the Borough's retail hierarchy, we would not expect this situation to significantly change over the course of the study period.
- 7.5.7 A further constraint to the local centres significantly altering their role and function is a lack of suitable sites for significant expansion of their retail offer. They are generally quite constrained in terms of their ability to accommodate a substantial amount of retail floorspace (i.e of the scale which would change their role and function as a local centre). We therefore expect these centres to operate with incremental improvements to their retail offer coming forward, which should be supported by the Council providing they are of an appropriate scale in relation to the role and function of the centre in question.
- 7.5.8 For all centres, reflecting national planning guidance, any new development should be directed towards town centres in the first instance.
- 7.5.9 **Convenience** - The household survey confirms that the Borough is served by a good network of foodstores, with Poole town centre and surrounding urban area particularly well served. The household survey also confirms that the existing network of foodstores are, for the most part, trading strongly, with the majority of stores trading above or close to company average levels. The identified under-trading in itself is an indication that there is sufficient provision and that any new development would simply alter market share and potential increase choice within its particular catchment.

Purbeck

- 7.5.10 **Comparison** – In Purbeck the two main centres of Swanage and Wareham are both considered in the healthcheck to be strong centres with limited vacancy. In terms of Swanage its offer is dominated by tourism outlets, however it does also perform as a local service centre function for the southern area of Purbeck. Whilst there are clear gaps in some of the retail offer, in particular clothing, it is unlikely that major redevelopment or a significant change in the market will occur to alter this position. In respect of Wareham, whilst it is not as dominated by tourism as Swanage it does have a strong local service function and again whilst the clothing sector in particular is not well represented, it has other strengths such as its evening economy.

- 7.5.11 **Convenience** - There are qualitative opportunities in both Swanage and Wareham for further convenience floorspace. Swanage is currently served by an overtrading Co-operative and a range of smaller convenience outlets. The store is particularly busy during the summer season, with store congestion and a lack of products on shelves a regular problem. A planned extension of this store would certainly help to alleviate some of these issues and the council may also want to consider the potential for another store to be brought forward to help improve choice and address the current leakage identified in the shopping patterns analysis. Although this is subject to a suitable site being identified.
- 7.5.12 In Wareham the issue is similar to that of Swanage with substantial leakage to Poole and over trading of existing stores. Previous work undertaken by Nathaniel Lichfield & Partners suggests that a new store would not have a significant impact on the existing town centre. Given the current overtrading and leakage we would concur with this statement in respect of the qualitative analysis. The issue in Wareham is identifying a suitable site. The current town centre is constrained with few redevelopment opportunities and none large enough to accommodate a store of sufficient size to alter current spending patterns – therefore the Council would need to seek sites beyond the current boundaries.

7.6 Summary of need

- 7.6.1 Our capacity assessment has identified quantitative requirements for the following amounts of floorspace:
- Comparison goods: between 15,000 and 19,000 sq.m net additional comparison goods floorspace by 2024, increasing to between 36,000 sq.m net and 40,000 sq.m net by 2031.
 - Convenience goods: between 1,000 and 2,000 sq.m net by 2024, increasing to 3,000 – 4,000 sq.m net by 2031.
- 7.6.2 Our qualitative assessment identifies that, for comparison goods shopping provision, there is a need to improve the quality of the retail stock in Poole town centre in order to 'future proof' the town centre and protect its role and function, and in the first instance the focus for this improvement needs to improving the Dolphin Centre and the High Street, where modernisation and amalgamation of units to create larger-format developments should be considered a priority. Improvements to the quality of the retail provision should in turn assist in diversifying the quality of the retail offer, and a key aspiration of the Council should be to seek the attraction of more middle/upper-middle-order comparison goods retailers to the centre in the short-to-medium term.
- 7.6.3 We do not consider there to be a pressing qualitative need for additional provision elsewhere in the study area, including Swanage and Wareham in Purbeck. However there is scope for the diversity of uses in all of the smaller centres to be improved, and therefore in instances where applications come forward which seek to provide additional comparison goods floorspace, they should be supported provided they are suitably located and are of an appropriate scale.
- 7.6.4 Turning to qualitative convenience goods needs, when assessing current provision within centres and the patterns of shopping identified in the household survey, we consider that:
- There is no requirement for any additional large-format foodstore provision within or in the vicinity of Poole
 - There is a requirement for additional provision within or on the edge of Swanage town centre (if a suitable site can be identified) to improve consumer choice and reduce the over-trading of the existing foodstores in the area;

- There is a requirement for provision of a small to medium-sized foodstore in Wareham, although it is acknowledged that finding a suitable site within or adjacent to the town centre is challenging

7.6.5 In Section 9 we discuss the spatial recommendations for the distribution of this identified requirement across the study area.

8 The need for new commercial leisure floorspace

8.1 Introduction

8.1.1 In this section we provide a summary of the scope for additional commercial leisure and other town centre uses which can be supported in the study area. Our findings are informed by an assessment of the growth of expenditure on leisure goods spending which is expected to come forward in the study area over the period to 2031, supported by the findings of the household survey of shopping and leisure patterns, as discussed previously in the report.

8.2 Audit of provision

8.2.1 Leisure uses are a key component of town centres because they help to increase footfall, and linked retail trips, both during the day and at night.

8.2.2 The town centre performance review highlights that the main town centres are well provided for with regard to restaurant and cafés compared to national benchmarks. This is key as this sub-sector is the most popular category; in spend per head terms, of the leisure uses. The larger towns also support popular cultural facilities, including cinemas and theatres.

8.3 Leisure Spend Patterns

8.3.1 The telephone survey of households included a number of questions aimed at finding out where residents spend most money in relation to various types of leisure services, as follows:

- Restaurants and cafés
- Pubs, bars and nightclubs
- Cinemas
- Museums and art galleries
- Family entertainment centres (i.e. ten pin bowling, skating and so on)
- Health and fitness centres
- Bingo/casinos/bookmakers
- Theatres/concerts

8.3.2 The most popular destinations for residents of each catchment zones (i.e. zones 1-14), are set out by category in **Table 8.1** and **Table 8.2**. These tables show the top destination visited across all zones, as well as any other destinations attracting more than 10% of visits.

8.3.3 The results highlights that residents of each zone generally favour visiting their closest town for restaurants and pubs and health and fitness. However, individual facilities dominate the cinema, family entertainment, theatre and gambling markets.

8.3.4 With regard to cinema going, the Empire in Poole is the number one choice for residents of all zones apart from zone 3. Similarly, the Bowlplex Tower Park is the favourite family entertainment destination for residents of all zones, both in Poole and Purbeck. The Gala Club in Mannings Heath is the favoured gambling destination for residents of all zones apart from zone 1, albeit with a relatively low proportion of residents participating in such activities.

Likewise, the Bournemouth International Centre and Lighthouse (Poole) are major draws for theatre and concert goers living across the study area.

- 8.3.5 Museums, art, galleries and zoos are the only leisure sector which shows significant leakage from the study area. Indeed, Central London attractions are a major draw for residents living in all study area zones.

Table 8.1 Most popular destinations for expenditure on leisure services (Purbeck residents)

Survey zone	Restaurants/ cafes	Bars/clubs and pubs	Cinema	Museums, art galleries, zoos	Family entertainment	Health and fitness	Gambling	Theatre and concerts
Zone 1 Swanage	Swanage (56%)	Swanage (40%)	Empire, Poole (30%) Mowlem, Swanage (14%)	Central London (13%)	Bowlplex Tower Park, Poole (29%)	Swanage (6%)	Swanage (4%)	Mowlem, Swanage (29%) Bournemouth International Centre (10%)
Zone 2 Wareham	Poole town centre (24%) Wareham (24%)	Wareham (26%)	Empire, Poole (28%) Odeon, Dorchester (27%)	Central London (18%)	Bowlplex Tower Park, Poole (29%)	Meyrick Park, Bournemouth (6%)	Gala Club, Mannings Heath (2%)	Bournemouth International Centre (13%) Lighthouse (11%)
Zone 3 Puddletown	Dorchester (34%) Blandford Forum (18%)	Dorchester (19%) Blandford (11%)	Odeon, Dorchester (49%) Empire, Poole (23%)	Central London (19%)	Bowlplex Tower Park, Poole (29%)	Dorchester Sports Centre (11%)	Gala Club, Mannings Heath (2%)	Bournemouth International Centre (13%) Lighthouse (11%)
Zone 9 Lytchett Matravers	Poole town centre (17%) Wimborne (20%)	Lytchett Matravers (19%) Wimborne (11%)	Empire, Poole (38%) Tivoli, Wimborne Minster (7%)	Central London (15%)	Bowlplex Tower Park, Poole (20%)	Virgin Active, Poole (6%)	Gala Club, Mannings Heath (4%)	Lighthouse (22%)

Table 8.2 Most popular destinations for expenditure on leisure services (Poole residents)

Survey zone	Restaurants/cafes	Bars/clubs and pubs	Cinema	Museums, art galleries, zoos	Family entertainment	Health and fitness	Gambling	Theatre and concerts
Zone 4 Upton	Poole town centre (46%) Poole Quay (20%)	Poole town centre (20%)	Empire, Poole (62%)	Central London (14%) Poole Museum (11%)	Bowlplex Tower Park, Poole (45%)	Dolphin Swimming Pool, Poole (17%)	Gala Club, Mannings Heath (1%)	Bournemouth International Centre (19%) Lighthouse, Poole (11%)
Zone 5 Town centre	Poole town centre (42%)	Poole town centre (22%)	Empire, Poole (45%) Lighthouse, Poole (16%)	Central London (11%)	Bowlplex Tower Park, Poole (35%)	Dolphin Swimming Pool, Poole (14%)	Gala Club, Mannings Heath (6%)	Lighthouse, Poole (28%) Bournemouth International Centre (13%)
Zone 6 Bransome	Poole town centre (29.25%) Bournemouth (14%)	Poole town centre (7%)	Empire, Poole (40%)	Central London (21%)	Bowlplex Tower Park, Poole (17%)	DW Sports Fitness, Poole (12%)	Gala Club, Mannings Heath (2%)	Lighthouse, Poole (25%) Bournemouth International Centre (14%)
Zone 7 Oakdale	Poole town centre (34%) Ashley Cross, Poole (11%)	Poole town centre (16%)	Empire, Poole (50%)	Central London (15%)	Bowlplex Tower Park, Poole (24%)	DW Sports Fitness, Poole (5%)	Gala Club, Mannings Heath (6%)	Lighthouse, Poole (16%) Bournemouth International Centre (12%)
Zone 8 Creekmoor	Poole town centre (44%) Bournemouth (14%)	Poole town centre (22%)	Empire, Poole (63%)	Central London (8%)	Bowlplex Tower Park, Poole (40%)	Virgin Active, Poole (4%)	Gala Club, Mannings Heath (9%)	Bournemouth International Centre (25%) Lighthouse, Poole (14%)
Zone 10 Broadstone	Broadstone, Poole (25%) Poole town centre (14%)	Broadstone, Poole (19%) Wimborne (13%)	Empire, Poole (52%)	Central London (13%)	Bowlplex Tower Park, Poole (29%)	Broadstone Leisure Centre (17%)	(Not applicable)	Bournemouth International Centre (13%) Lighthouse, Poole (11%)
Zone 11 Newtown	Bournemouth (32%) Poole town centre (15%)	Bournemouth (15%)	Empire, Poole (42%)	Natural History Museum (6%)	Bowlplex Tower Park, Poole (17%)	DW Sport Fitness, Poole (7%)	Gala Club, Mannings Heath (4%)	Bournemouth International Centre (15%) Lighthouse, Poole (12%)
Zone 12 University	Poole town centre (26%) Bournemouth (14%)	Poole town centre (13%)	Empire, Poole (53%)	Central London (3%)	Bowlplex Tower Park, Poole (39%)	Rossmore Leisure Centre, Poole (13%)	Gala Club, Mannings Heath (6%)	Bournemouth International Centre (20%) Lighthouse, Poole (12%)

Zone 13 Bearwood	Bournemouth (36%)	Boscombe (14%)	Empire, Poole (30%) Odeon, Bournemouth (18%)	Central London (8%)	Bowlplex Tower Park, Poole (22%)	Pelhams Park Leisure Centre, Bournemouth (16%)	Gala Club, Mannings Heath (11%)	Bournemouth International Centre (13%)
Zone 14 Ashington	Wimborne (50%) Poole town centre (14%)	Wimborne (36%)	Empire, Poole (44%) Tivoli, Wimborne Minster (18%)	Central London (9%)	Bowlplex Tower Park, Poole (27%)	Queen Elizabeth Leisure Centre, Wimborne Minster (8%)	Gala Club, Mannings Heath (1%)	Bournemouth International Centre (15%) Lighthouse, Poole (11%)

Distribution of leisure expenditure

- 8.3.6 Experian supplies information on per capita leisure spending in COICOP (Classification of Individual Consumption by Purpose) categories (see table 8.3).
- 8.3.7 The study area resident spend on leisure services is estimated to be £1,733 per head in 2014 and £445.2 million in total. The highest spend category is 'restaurants and cafes' at £1,000 per head on average and £257.2 million in total. Cultural services are the second most popular spend category at £300 per head on average and £77.2 million in total spend.

Table 8.3 Leisure spend (totals by category)

Category	2014
Recreation & sports	£27.3m
Cultural services	£77.2m
Bingo/casinos/bookmakers	£30.2m
Restaurants, cafes etc.	£257.2m
Accommodation	£29.8m
Hairdressers salons	£23.5m
Total	£445.2m

8.4 Growth in leisure spending

- 8.4.1 Table 8.4 sets out how study area resident spend on leisure activities is forecast to change in between 2014 and 2031. Between 2014 and 2031 the total leisure spend of study area catchment residents is forecast to increase by £177.7m from £445.2m. The largest increase

will be in restaurant/cafes (+£102.7m), followed by £30.8m growth in spend on cultural services.

Table 8.4 Leisure spend – study area 2014-2031

Category	2014	2019	2024	2029	2031	Total change 2014-2031
Recreation & sport	£27.3m	£30.5m	£33.6m	£36.8m	£38.1m	£10.86m
Cultural services	£77.2m	£85.8m	£95.1m	£104.2m	£108.0m	£30.81m
Bingo/casinos/bookmakers	£30.2m	£33.6m	£37.2m	£40.8m	£42.3m	£12.05m
Restaurants, cafes etc	£257.2m	£286.0m	£317.0m	£347.5m	£359.9m	£102.7m
Accommodation services	£29.8m	£33.2m	£36.8m	£40.3m	£41.7m	£11.88m
Hairdressing salons	£23.5m	£26.1m	£28.9m	£31.7m	32.9m	£9.36m
Total	£445.2m	£495.0m	£548.6m	£601.4m	£622.9m	£177.7m

Source: Spend per head figures from Experian MMG3, combined with population estimates. Total figures grown in line with growth estimates set out in Table 2 of Experian Retail Planner Note 12

- 8.4.2 It should be noted that Table 8.4 only shows the 2014 and forecast leisure spend for Poole and Purbeck residents. It does not therefore take account the significant inflow of tourism spend into the area. Inflow of spend into Purbeck is particularly strong, with staying visitors contributing an estimated £24.6m spend on accommodation, £17.0m on food and drink and £8.2m on attractions/entertainment in 2012¹¹. In the same year staying visitors are estimated to have spent £39.2m on accommodation, £23.4m on food and drink and £11.2m on attractions/entertainment in Poole.
- 8.4.3 Based on existing leisure spend patterns, the increased spend by study area residents alone on leisure services could support a range of new restaurants, cafes, bars, salons and bookmakers across the study area. The increases in spend may also support additional investment in accommodation, and recreation and sport (including family entertainment). Aside from restaurants the greatest growth and overall spend is in cultural services. This would include the spend available for cinema provision. Given that there is available expenditure for both cinema and restaurants it does suggest that there would be potential for a new multi-use leisure venue which includes both these leisure outlets to be located within the study area.
- 8.4.4 As businesses differ greatly, from national chains through to smaller independent outlets, quantifying the number of businesses these growths in leisure spend could support have not been undertaken.

¹¹ South West Research Company Ltd (2014) 'The Economic Impact of Dorset's Visitor Economy 2012'

8.5 Summary

- 8.5.1 Leisure uses are a key component of vital and viable town centres as they drive footfall and linked retail trips. Poole and Purbeck as a whole are relatively well provided for in terms of facilities, particularly with regard to the restaurant and café offer which also benefits from visitor spend.
- 8.5.2 Analysis of household spending patterns shows that considerable available leisure expenditure is retained in the study area, particularly in Poole, although Bournemouth and London are big draws for theatre and museum/gallery goers respectively.
- 8.5.3 Given the forecast levels of spending growth in restaurants and cafes in particular, it is recommended that both Poole and Purbeck Councils, as planning authorities, should encourage the growth of this sub-sector. Considerable expenditure growth is also forecast in the cultural services sector. This could potentially support another cinema and/or theatre although these will have to compete with the dominance of the Empire Cinema and Bournemouth International Centre.

9 Strategy and recommendations

9.1 Introduction

9.1.1 In this section, we provide our recommendations with a local context taking into account our findings in sections 1 to 8. We explain our recommendations on how much new floorspace is needed before outlining some suggested strategies for the principal centres in the study area. We then identify potential development opportunities, provide policy recommendations, and finally suggest how the findings in this study could be monitored.

9.2 Policy recommendations

Need for New Floorspace

9.2.1 The NPPF (paragraph 161) requires evidence on quantitative and qualitative needs for retail and leisure development over the Plan period. Quantitative effectively means how much floorspace is required, whilst from a qualitative perspective we need to consider what type of floorspace is required. It is necessary to consider both elements of need to understand how to formulate planning policies.

9.2.2 In respect of quantitative need for retail floorspace, we have calculated this primarily on a study area wide basis based on a constant market share (i.e. the study area maintains its current share of spending within the study area to 2031). This is presented for retail floorspace that sells convenience goods (i.e. food and grocery) and comparison goods (non-food items). It is shown as a range to take into account both Experian estimates of SFT and the locally derived survey based SFT and presented as net sales area in Table 9.1.

Table 9.1 Quantitative Need for Retail Floorspace (rounded to nearest 100)

	2014-2019	2019-2024	2024-2029	2029-2031	Total 2014-2031
Convenience floorspace (sqm net)	-1400 to -1,100	2,600 to 2,877	1,500 to 1,600	500 to 600	3,200 to 4,000
Comparison floorspace (sqm net)	4,200 to 6,400	11,000 to 12,500	13,900 to 14,900	6,400 to 6,700	35,600 to 40,500

9.2.3 Our quantitative outputs are presented on a cumulative basis and have been rounded to the nearest 100sq.m. They do not include the needs for any A1 service uses or any other A class uses.

9.2.4 This demonstrates that there is a quantitative need for new floorspace to sell comparison goods, but this is largely generated at the end of the Plan period (between 2024 and 2031) when expenditure growth and population growth result in a potential need for additional floorspace. In respect of convenience, there appears to be an initial oversupply of floorspace. This is primarily due to a number of extant planning applications, mainly in Poole.

9.2.5 Whilst the quantitative needs for new floorspace is formulaic, the approach to qualitative needs can be more flexible and take into account local factors such as quality of accommodation or gaps in provision. We have identified the following qualitative need factors in Poole and Purbeck:

- There is qualitative need for larger retail units within Poole town centre to meet the needs for national retailers, although, in line with the wider trends observed, we would expect demand for retailer representation in Poole to remain reasonably limited;
- In Poole town centre there is a need for an improved quality of comparison goods retail provision, particularly in the clothing sector, in order to maintain market share and limit expenditure leakage to Bournemouth and other surrounding centres;
- There is a need for new convenience floorspace in Swanage and Wareham

9.2.6 In respect of leisure uses, the methodology for establishing needs is less evolved than the retail approach due to limited data availability on existing turnover and trading levels of leisure businesses and the broad formats of development that exist. However, we have undertaken a broad assessment considering the quantitative needs for A3-A5 uses as well as considering the expenditure growth available to support other formats of leisure development. Therefore we have identified there is need for further provision of restaurants and cafes across the study area. There is also scope for new cinema provision, although to be commercially attractive this will need to come forward with a range of other retail and leisure uses.

Meeting the need

9.2.7 We have identified a quantitative a qualitative need for floorspace within the study area. However, the level of floorspace required and the location for this floorspace requires further discussion. Poole and Purbeck have choices in terms of how these needs are met. The needs assessment will inform the preparation of revised plans in both Poole and Purbeck. Whilst the study has been jointly prepared it is also necessary to consider the requirements for each authority for them to take forward into their plan making.

9.2.8 In terms of the identified need as set out above the authorities need to consider the requirements within their overall development strategy, including:

- availability of sites and market appetite for development and location of retail and leisure outlets
- whether Poole and Purbeck want to retain market share and meet the identified floorspace needs or accept a reduced market share and constant or reduced level of floorspace.
- maintain market share through improved use of existing floorspace resulting in a higher sales density i.e. more money spent in the same amount of floorspace
- the importance of offering a choice to the consumer and addressing gaps in provision

9.2.9 **Poole** – Poole town centre should be the focus for the majority of all new retail comparison floorspace in Poole as per national guidance in the NPPF. Our review of Poole town centre suggests there is scope for new floorspace around the bus station and depot. However elsewhere within and adjacent to the town centre there is limited scope for further floorspace, without further compromising the retail circuit. However, at present it is considered that there will be limited commercial interest in developing large scale retail led shopping schemes in centres such as Poole, therefore a deliverable scheme will require a mix of uses.

9.2.10 Poole town centre currently attracts a strong market share. Nevertheless, to continue to maintain this share, substantial development of comparison floorspace will be required over the plan period. However, it is also considered that there are few sites within the centre and limited interest in this type of development. It should also be noted that if Poole identified sites to accommodate all the theoretical need identified to 2013 it would effectively double the level of comparison floorspace in Poole town centre, which at a time of diminishing floorspace requirements is highly improbable, therefore it is considered that Poole town centre should:

- Only seek suitable sites to accommodate the majority (proportionate) amount of the comparison floorspace identified to 2024
 - Aim to improve the sales density of existing floorspace (currently around £5,500 per sq.m) through provision of modern floorspace, larger floor-plates and higher order retailers to meet longer term needs
 - Seek suitable sites to accommodate a limited level of convenience floorspace within the identified regeneration areas to meet day to take local convenience needs of those areas arising from the new development.
- 9.2.11 Within the town centres across the study areas 80% of floorspace is within Poole town centre and 20% is within Swanage and Wareham town centres. In expenditure terms the figure is even starker with Poole town centre attracting around 95% of the expenditure which is spent in town centres within the study area, with Wareham and Swanage accounting for 5%. As suggested above if floorspace requirements for comparison floorspace are proportional in terms of current patterns then the Council should identify the floorspace in Poole town centre as follows:
- Poole town centre comparison (net): 14,500 sq.m – 18,000 sq.m
- 9.2.12 In terms of convenience floorspace in Poole it is not considered necessary to identify any floorspace with the Plan. There are a number of extant convenience floorspace applications and there is no lack of choice of operator or any significant gaps in provision.
- 9.2.13 **Purbeck** – There is limited opportunity to expand either of the main centres of Swanage and Wareham for comparison goods floorspace. However as the majority of floorspace is currently located in Poole town centre and it is not anticipated that either Swanage or Wareham will increase their market share it is considered that only a modest level of comparison floorspace should be sought:
- Swanage and Wareham town centre comparison (net): 750 sq.m – 950 sq.m
- The amount to be distributed between the two towns will be dependant the type of floorspace likely to come forward and the availability of sites when detailed allocations are considered.
- 9.2.14 In respect of convenience provision, whilst there is not significant need across the study area due to extant permissions there is clearly a gap in provision in both Swanage and Wareham town centres, therefore what need that has been identified to 2024 should be allocated within Purbeck to address the current deficiencies.
- Swanage and Wareham town centre convenience (net): 1,200 sq.m – 1,800 sq.m
- 9.2.15 This floorspace could be distributed evenly between the two town centres, which would support a new small supermarket in each location at the upper end of the range or a larger store could be built in either of the towns and an extension to existing facilities. The approach will again depend on site availability.
- 9.2.16 **Other areas** - In areas of significant residential growth (once these are finalised) it will be important to fully test whether their existing centres meet local needs (convenience and service orientated comparison goods).
- 9.2.17 Smaller scale extensions or redevelopments should be encouraged within both local authorities' other centres, but we see no need for any significant policy intervention. Applications for new development within these centres which are of an appropriate scale should be considered on their individual merits.

Hierarchy of centres and shopping frontages

9.2.18 The NPPF requires a definition of a network and hierarchy of centres that is resilient to anticipated future economic change. Based on the evidence we have collected, we suggest the following hierarchy of centres:

- Town Centre:
 - Poole town centre
 - Swanage town centre
 - Wareham town centre
- Local Centres:
 - Upper Parkstone
 - Ashley Cross
 - Broadstone
 - Corfe Castle
 - Wool
- Other policy areas
 - Poole Quayside and historic quarter

9.2.19 The NPPF requires local authorities to define the extent of town centres and primary shopping areas, based on a clear designation of primary and secondary frontages in designated centres. Based on the definitions in Annex 2 of the NPPF, the methodology for defining such boundaries and frontages ought to start centrally and work outwards. If we are considering the position now, the approach is as follows:

9.2.20 Define first primary frontages as those frontages that include a high proportion of retail uses (including food, drinks, clothing and household goods). In our view, these ought to represent the frontages with most daytime footfall;

9.2.21 Then define secondary frontages as those frontages that include town centre uses, but have a wider diversity of non-retail uses, such as restaurants, cinemas and businesses;

9.2.22 Using the primary and second frontages, the primary shopping area should be defined as area where retail is concentrated by plotting the area around primary retail frontages and adjoining and closely-related secondary frontages. It does not necessary follow that secondary frontages fall within the primary shopping area, but often they do. This area typically represents the 'retail heart' of a town.

9.2.23 Finally, the town centre boundary should be plotted that incorporates all of the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. So this means the area will incorporate any adjacent non-retail town centre uses, such as leisure uses, offices, arts, cultural and tourism uses.

9.2.24 It is possible for smaller centres that the primary shopping area will be identical to the town centre boundary.

- 9.2.25 It will always be necessary to consider whether there is a requirement to intervene in policy terms to change these areas from what is currently on the ground, for example to facilitate development by expanding a primary shopping area, or to encourage diversification of uses away from solely retail by reducing a primary frontage and converting it to secondary. In any event, the eventual boundaries will need to be tested and consulted upon as the Council's Local Plan is prepared. However, we consider that the boundaries and areas plotted are based on our interpretation of the NPPF and local circumstances.
- 9.2.26 **Poole** - The town centre boundary in Poole should be reviewed and reduced in size to the south but extended to the north. The southern area of the High Street from New/Old Orchard should be removed from the town centre area. Whilst this area shows characteristics of the town centre it is more associated with the Quayside area. It is considered that the Quayside area and this southern section of the higher street should be identified as a separate policy area where a mixed of uses is encouraged, including residential uses to improve the vibrancy and activity in this attractive part of Poole. To the north east and north west the boundary could be extended to include the railway station and the Lighthouse Centre and areas in between. Whilst it is accepted that this area is currently severed by Kingland Rd, future proposals could downgrade this road and bring this important area within the centre. The remaining part of the town centre as currently shown in the Site Specific Allocations and Development Management Policies DPD, April 2012, should remain.
- 9.2.27 The primary shopping area should also be reduced and only include the Dolphin Centre and the High Street until it meets New/Old orchard. The primary shopping frontage should follow the same area. It is not considered that there are sufficient secondary areas to include a separate secondary frontage.
- 9.2.28 **Purbeck** – The current Local Plan does not formally designate a town centre boundary; however an area is identified on the proposals map as 'Retail Provision'. The accompanying policy does not confirm that the area delineated as Retail Provision is also the town centre for the purposes of planning policy. Both boundaries are tightly drawn around the existing retail offer. In Wareham the Retail Provision area is tightly surrounded by residential properties and therefore including these within a wider town centre area would serve no purpose, so the Retail Provision area should be converted to a town centre using the existing boundary. In Swanage it is considered that there is scope to widen the current Retail Provision boundary. In particular the boundary could be extended northwards along Shore road to its junction with the A351. The boundary could then be extended to Repstone Road until its junction with Gilbert Road. The area around the station and fire station could also be included. The remaining areas of the Retail provision policy area are considered as a reasonable proxy for the town centre.
- 9.2.29 The primary shopping area and primary shopping frontages should follow the same areas as those set out as the 'Retail Provision' area in both Swanage and Wareham as shown in the Local Plan. It is not considered that there are sufficient secondary areas to include a separate secondary frontage.
- 9.2.30 The NPPF is clear in its requirement for the sequential test to be applied and an impact assessment to be undertaken when considering applications for main town centre uses that are not in an existing centre and not consistent with an up-to-date Local Plan. However, the NPPF also provides local authorities with flexibility to set its own policies 'for the consideration of proposals for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan'. In our view, the Council should take this opportunity to set its own policies taking into account some of the local circumstances we have identified in this study.

Local impact test and impact assessment threshold

- 9.2.31 In our view, the established NPPF tests for a sequential test and impact assessment should be included in policy, as set out in paragraphs 24 and 26 in the NPPF. But we consider that a

further local impact test should be introduced into policy. This should reflect local aspirations, but also the specific development pressures in Purbeck and Poole. As well as the NPPF impact test, in our view, the policy should require impact assessments for proposals outside town centres to consider the following:

- The extent to which the market profile of the development proposed will compete with existing facilities in town centres;
- The potential for relocation of businesses currently trading in town centre to locations out-of-centre;
- The impact on linked trip spending between different town centre uses or businesses;
- The cumulative effect of more than one development coming forward at the same time; and
- The impact through trade diversion on the role and function of a town centre or centres.

9.2.32 We consider that the local impact considerations ought to be scoped out carefully with the community to ensure that they protect town centres but also provide a robust basis against which to judge planning applications for town centre uses that are outside town centres.

9.2.33 Finally, it is appreciated that the NPPF provides an opportunity to set a local impact threshold (with the default being 2,500 sq.m). In our view, 2,500 sq.m is too high a threshold for Poole and Purbeck, given the market evidence of smaller convenience stores and the limited size of some of the centres in both areas. We have analysed current unit sizes in the three identified town centres – these average around 350 sq. m gross in Poole and 120 sq. m gross in Swanage and Wareham. Developments of floorspace above the average unit size are likely to be attractive to the market and potentially have an impact on town centres. We are therefore of the view that developments of less than 2,500 sq.m could potentially cause a significant adverse impact in centres within both Poole and Purbeck, depending on the occupier and location. Using the default would mean such developments would not need an impact assessment under the NPPF.

9.2.34 As such, we consider that the impact threshold should be as follows:

- Developments outside Town Centres / Local Centres in Poole: 400 sq.m gross
- Developments outside Town Centre / Local Centres in Purbeck: 200 sq.m gross

9.2.35 It will be important policy is drafted to ensure clarity on where each threshold applies. To avoid cumulative developments that exceed this threshold, we consider that an impact assessment should be required if the threshold is breached in one year by more than one planning application.

9.3 Strategy recommendations

Development opportunities

9.3.1 The NPPF requires that local planning authorities allocate a range of suitable sites to meet its town centre needs. Accordingly, we have considered potential development opportunities within the district, taking account of the sequential test. Therefore, in this study, we focus on town centre opportunities in the first instance, and in particular in Poole town centre.

9.3.2 From our analysis we have identified that the sites with the greatest potential for redevelopment in Poole town centre are the Bus Station site, and existing retail units on High Street. Within Swanage the only realistic option is the land around the current Co-operative

Supermarket. There are no suitable development sites within or on the edge of Wareham town centre. We discuss these further below.

- 9.3.3 It is advised that the desirability and viability of the redevelopment of these sites will need to be thoroughly tested to understand the potential contribution these sites can make in meeting the District's needs; the assessment provided by this study only forms a high-level assessment. However, when a fuller analysis of site deliverability is undertaken, it should be recognised that our assessment has identified that quantitative goods comparison needs are principally generated in the longer term - and as such there is merit in safeguarding sites for future development towards the end of the plan period, should further analysis prove them to be viable development opportunities.
- 9.3.4 As a follow-on from the high-level assessment carried out in this study, a suitable next step for the Council would be commissioning a more detailed assessment of each of the opportunity sites identified, which the Council wishes to see come forward for the development of town centre uses.

Framework for Town Centre Strategies

- 9.3.5 The NPPF requires local authorities to promote competitive town centre environments. The PPG emphasises the importance of having strategic visions and provides guidance on the contents on a town centre strategy. In summary, the PPG suggests a vision should answer questions on the role and function of a town, its vision, the opportunity to meet needs, the timescales to provide retail floorspace, the provision of possible complementary strategies and finally how parking can be enhanced.
- 9.3.6 Town centre strategies necessarily cover a wide range of topics. As such, using the results of this study, we outline a potential framework for a town centre strategy for each of the District's centres. The Council can use our framework to formulate its town centre strategy through the Plan review process, although we emphasise the importance of ensuring deliverability of any strategy.

Poole

- 9.3.7 Poole is the largest centre in the study area and attraction for retail, leisure and other town centre uses. The town centre performance could be described as baffling, in that despite the seemingly poor environment and relatively high vacancy rate the centre still attracts a high proportion of expenditure from the study area. However, the centre is under threat from competition for expenditure both from existing and planned competing facilities outside the Borough. So, unless concerted action is taken, the centre may deteriorate causing a detrimental impact the area socially and economically.
- 9.3.8 Below we have outlined a four-stage strategic approach which we think - if followed - could secure the town centre's future as a competitive environment. It is important that the Council works alongside other key stakeholders such as the BID team, local businesses, and landowners, to ensure this strategic approach is successfully implemented.
- Vision: we recommend that further work is undertaken with key town centre stakeholders on developing a vision for the town. To do this, there needs to be a clear process and the Council might want to consider appointing a political lead and lead officer to guide the process. The owners of the Dolphin Centre, are an important party, as are the Council themselves as a land owner. The vision needs to answer the question: 'Why come to Poole town centre in 10 years' time?'
 - Strategy: the vision will then need to be translated into a strategy of how it will be realised. This needs to be co-ordinated across all Council functions and with main stakeholders. We would expect that the Strategy will include:

- A clear governance structure, including the role of the Council, in order to provide firm, committed leadership to the strategy;
 - Some physical development, to enhance the offer;
 - Selected interventions to improve the retail circuit, preferably linked to development;
 - Environmental enhancements and improved public realm to help link the various quarters of the town centre together in a cohesive manner;
 - Supportive planning policy;
 - Setting up some form of Town Centre Management; and
 - Support for key independent retailers (the Council may wish to have regard to the promotion of this sector by the Rotherham Portas Pilot, for example)
- **Management:** establish how on-going enhancement of the town centre should be achieved. Effective town centre management should be directed and run as a cross-departmental service, involving many outside stakeholders as well. It includes such matters as - cleansing, policing, event management, property (including promoting development), business support, business rates, planning policy, development management, stakeholder engagement, public realm improvements, traffic and highway management, car parking (and its pricing), signing, and much more - all taking place within the context of an overall town centre strategy.
 - **Core Opportunities:** in terms of interventions, our recommendations for the core opportunities in the town centre are as follows:
 - **Bus Station and depot:** this site forms a clear opportunity for the introduction of important town centre uses which are currently absent from or under-represented in Poole town centre, and we consider a comprehensive redevelopment to include a cinema, restaurant/bars to enhance evening economy and improve dwell time could be developed and some retail to help meet the identified needs. We are aware the site has been promoted in the past; what is needed now from the Council is a programme to consider the next steps which need to be taken in order to facilitate the redevelopment of the site. The aim should be to integrate the bus station site with the Dolphin Centre and the Lighthouse centre and improve linkages with the existing retail circuit. There are existing linkages available which offer the opportunity to be better developed, enabling any development to integrate with the wider town centre retail circuit. Clearly, any redevelopment of the site would have to consider carefully the bus facilities and how these should be best incorporated (or not) into any scheme.
 - **High Street:** the aspiration for this area should be to promote redevelopment of existing shop units to form larger, modern shop units. This will in turn improve the town centre retail offer through the attraction of better quality / footfall-driving retailers, and deliver two added benefits - resolving the poor retail offer and stock at the south end of High Street. A suitable first step would be for the Council to establish policy support for the redevelopment of units in this area of the town centre. The Council has already put in place a Local Development Order which allows changes of use without planning permission. This could be furthered through plan policy that allows for a variety of retail and leisure uses on the ground floor and residential development above. The Council should also investigate opportunities for land assembly within the area to help drive forward the process, as we understand that much of the area falls under multiple ownership.

- Poole Quayside and historic core: although we have recommended that this area should be given its own policy designation separate to the town centre, it is still an important contributor to the wider success of Poole. Continued support of the development of the Quayside area will act as a significant confidence builder to new investment in the centre. A critical component of this development will be ensuring that linkages between the town centre and the Quayside are sufficient so that both areas will benefit from any investment.

Swanage and Wareham

In terms of Swanage and Wareham the same principles set out above for Poole will apply in respect of approach to town centre strategy. However, whilst there are opportunities to make physical changes to the centre in Poole, these options are more limited in Wareham and to a lesser extent in Swanage. Therefore any strategy is likely to include a range of softer measures to provide greater reliance and ensure vital and viable town centres in the future. Whilst these measures are outlined in this section for Purbeck, many are equally applicable to Poole.

- Building on positives – there are a good range of independent, specialist stores in the town centres, which is a positive point that sets the towns apart from other competing centres. They still support high quality convenience stores such as butchers, bakers etc. The quality of local produce provided through these outlets, and the personal customer service provided by the shop keepers, is a key asset that isn't provided by large supermarkets and should be encouraged.

The council and its partners should therefore focus their attention on supporting independent stores, both new and long established outlets, as opposed to trying to attract national multiples. This support should range from direct support for marketing, promotion and branding, as well as protection of the centre through planning policy.

- Events - Efforts should be made to continue to ensure that the town centres are a focus for community life, which, in turn, helps to increase spend in local shops. It is therefore recommended that one-off and annual events continue to be supported and happen throughout the year, not just in the summer season. These events should be family orientated, to align with the catchment population profile.
- Think Local - whilst not an original idea, each town should consider for example a launch of a 'think local: buy local' campaign. The purpose of the campaign should be to inform the public about the strong economic, environmental and social benefits of buying locally and to encourage them to 'think local' wherever possible. This approach could, for example involve the offer of appropriate incentives and promotions. Another approach is to focus on a particular product offer or service that is going to appeal to people locally and perhaps beyond, for example furniture or weddings – there are numerous examples around the country where this has happened, such as Hay-on-Wye with its books or Tetbury with its antiques.

The success of these types of initiatives is dependant on the goodwill and expertise of local business and their ability to come together for a common cause. Businesses should, together, think about how to market their services to attract and increase patronage.

- Car parking - Reduced or free car parking is often identified as one of the main changes that could be implemented that would encourage people to visit the town centre more often and for longer periods.

However it is acknowledged that car parking charges provide an important revenue stream for the Council. Although it is clear that charges will be retained and that total income targets will still need to be met, it is recommended that alternative charging schedules are tested that help to encourage longer visits of between 1 and 3 hours, as opposed to the shorter average stay – especially important during the off season. Longer stays usually

result in higher spending, including more leisure related activities such as eating or visiting a local attraction.

- Marketing - Marketing of the town centre shops, events and offers need not cost much. Facebook, Twitter and other social networking forums are free to use and allow access to a wide audience. Establishing a Swanage and Wareham town centre themed page that could be updated and monitored by a number of key individuals, and followed by the wider community, could prove to be very effective. This should be linked from as many other websites as possible, including individual business websites, the District and Town Councils' websites and tourism websites. A different business could be profiled each week and updates would appear on users' home pages on a regular basis.

Most shopping centres and even some town centres are investing in Wi-Fi technology which allows people in their shopping centres or town centres to access the internet free of charge. Users are usually taken directly to the homepage of the centre, where, as well as the normal marketing elements, store directories etc. there are often bespoke offers for that particular day for specific stores. This is a great way of encouraging people to use the centre and spend money whilst they are there.

However, although the internet and social networking sites have taken off in recent years, they are not used by all sections of society, particularly the older age groups. Use of the local newspapers to advertise events and businesses should therefore still be used as far as possible.

Other centres

- 9.3.9 We do not advise on strategies for the smaller local centres of Upper Parkstone, Ashley Cross, Broadstone (Poole) and Corfe Castle and Wool (Purbeck). We would not expect significant additional amounts of retail or commercial leisure to come forward, although applications for new development which will enhance the vitality and viability of centres should be considered favourably, provided they are suitably located (within an identified centre or on a well-connected edge-of-centre site) and are of a scale appropriate to the role and function of the centre.
- 9.3.10 In each of these cases the focus should be on supporting existing local-scale shopping facilities. Should any applications for new development come forward, they should be considered on their individual merits, but resisted if they are more appropriate to a higher-order centre.

9.4 Monitoring

- 9.4.1 This study provides each Council with its floorspace needs requirements to 2031. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, the Council should monitor:
- i. planning permissions for retail floorspace - by type, amount (sq.m gross and net), location and retailer;
 - ii. completions of retail floorspace - by type, amount, location and retailer;
 - iii. mix of uses, including vacancies; and
 - iv. health checks of designated centres
- 9.4.2 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for items (i) and (ii) and annually or every two years for items (iii) to (vi). Time series data can thus be produced and continually updated, starting with this study or possibly

with earlier work undertaken by each of the Councils. Contingent on the timetabling of each Council's reviews of its' Plans, such updating will prove to be valuable when this evidence is tested at examination in public.

- 9.4.3 This report provides a robust indication of the current position. The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring for each Council.

Appendix A Healthchecks

Appendix B Comparison, Convenience & Leisure Tables

Appendix C Analysis of floorspace with local SFT

9.5 Analysis of floorspace requirement using a local SFT rate

9.5.1 The floorspace analysis in this report has been estimated using Experian Retail Planner guidance as discussed in previous sections. The household survey also provides an insight into the propensity for shoppers to use non-store methods for both comparison and convenience shopping. Table A.1 shows that the local SFT rate is considerably higher for both comparison goods and convenience goods within Poole and Purbeck.

Table A.1 SFT rates provided by NEMS

	Comparison goods SFT (average of all zones)	Convenience goods SFT (average of all zones)
2014 SFT rate from NEMS household survey	21.5%	3.9%

Source: NEMS Household survey Sept 2014

9.5.2 Analysis of floorspace requires us to forecast what the SFT rate is likely to be in the future. Increasing these rates in line with Experian's forecast increase in SFT over the same plan period also gives an estimated figure for 2019, 2024, 2029 and 2031, as set out in Table A.2.

Table A.2 Local SFT estimated growth

	Comparison goods SFT (average of all zones)	Convenience goods SFT (average of all zones)
2019 (based on Experian growth forecast)	28.1%	5.7%
2024 (based on Experian growth forecast)	29.4%	7.2%
2029 (based on Experian growth forecast)	28.9%	8.0%
2031 (based on Experian growth forecast)	28.5%	8.4%

9.5.3 Using the same methodology as previously discussed in the report, but applying these local SFT figures to our retail expenditure analysis for both comparison and convenience shows that the required floorspace is considerably lower, as can be seen in tables A.3 for convenience and A.4 for comparison.