Nathaniel Lichfield & Partners
Planning. Design. Economics.

Retail, Leisure and Town Centres Study

Part 1 - Development Needs

Rushmoor Borough Council and
Hart District Council

February 2015
11051/04/PW/JeH

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This document is formatted for double sided printing.

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Glossary

Benchmark Turnover

The expected turnover of existing retail facilities based on sales floorspace and expected average sales densities.

Class A1

Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services

Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.

Class A2

Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3/A4/A5

Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.

Convenience Goods

Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.

Comparison Goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy who are widely used for retail planning information.

Goad Plans

Town centre plans prepared by Experian, which a based on occupier surveys of over 1,200 town centres across the country.

Gross floorspace

Total external floorspace including exterior walls.

Higher order comparison goods

Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.

Lower order comparison goods

Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.

Multiple traders

National or regional ‘chain store’ retailers.

Net floorspace

Retail floorspace devoted to the sale of goods, excluding storage space.

Special forms of trading (SFT)

Non-store retail activity. SFT includes other forms of retail expenditure not spent in shops eg. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling.

Turnover efficiency

An allowance for a retailer’s ability to improve their turnover efficiency or sales density and the potential for existing floorspace to increase its productivity in the future. This may be achieved through spending growing at faster rates than new floorspace provision and retailers’ ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned to prepare a joint Retail, Leisure and Town Centres Study on behalf of Rushmoor Borough Council and Hart District Council. This Study comprises two separate parts. Part 1 addresses the joint development needs of the two local authorities for retail, leisure and town centre uses. Part 2 provides an audit and review of the existing centres within the two separate authorities, as well as identifying the capacity of centres to accommodate the new town centre development requirements.

Study Objectives

1.2 The key objective of the Retail, Leisure and Town Centre Study will be to provide a robust and credible evidence base to inform both Councils' work on new local plans. The joint Retail, Leisure and Town Centre Study will update work previously undertaken in the Rushmoor Retail and Leisure Study (2010) and the Hart Retail Study Update (2012). The key objectives of the Part 1 Study will be to:

- assess changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession and the availability of 2011 Census data;
- assess the future need and (residual) capacity for retail floorspace distributed by the main centres/shopping destinations for the proposed plan period; and
- assess the potential implications of emerging developments both within and outside Rushmoor and Hart, in terms of impact on town centres and potential changes to shopping patterns.

1.3 Section 2 of this report describes the shopping hierarchy. Section 3 outlines recent changes and retail trends. Section 4 provides the retail capacity and quantitative need assessment. Section 5 assesses the capacity for commercial leisure uses and Class A3 to A5 food and beverage floorspace. Section 6 provides the recommendations and conclusions.

2.0 The Shopping Hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Development plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The National Planning Practice Guidance (NPPG) replaces the PPS4 guidance on town centres. In terms of plan-making the NPPG's emphasis is on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs. These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate. This section provides an overview of the shopping hierarchy in Rushmoor, Hart and the surrounding sub-region.

Centres in Rushmoor, Hart and the Surrounding Area

2.3 Rushmoor Borough and Hart District are bounded by Guildford, Surrey Heath, Bracknell Forest, Wokingham, Basingstoke & Dean, East Hampshire and Waverley local authorities.

2.4 Rushmoor Borough contains two main settlements – Farnborough and Aldershot – and the smaller centre of North Camp. Hart District is more rural, and the main centre is Fleet, with smaller centres at Hook, Yateley, Hartley Wintney, Odiham and Blackwater.

2.5 The Rushmoor Core Strategy (2011) identifies the hierarchy of town, district and local shopping centres. Farnborough and Aldershot are defined as town centres and the focus for retail development and town centre uses. North Camp is defined as a district centre that supports local needs. The local shopping centres within the Borough provide day to day local shopping and service needs. Rushmoor also contains retail warehouse parks within Farnborough comprising Solartron Retail Park and Farnborough Gate/ Blackwater Valley Retail Park.

2.6 The withdrawn Hart Core Strategy identified the retail hierarchy within the District. Fleet is the only town centre, Hook, Yateley and Blackwater are defined as district centres, and Hartley Wintney and Odiham are identified as local centres Fleet is the major settlement in the District, providing a range of shopping, employment and leisure facilities.

2.7 Venuescore ranks the UK's top 2,500 plus retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Only the centres of Farnborough, Aldershot and Fleet, together with retail parks in

Farnborough, are listed within Venuescore's data. None of the other centres in Rushmoor and Hart are listed. The results for these destinations and other relevant centres are shown in Table 2.1.

Table 2.1 Venuescore UK Shopping Index 2013

Centre	Location Grade	UK Rank	Venuescore
Reading	Major City	13	397
Guildford	Major Regional	33	279
Basingstoke	Regional	53	225
Woking	Regional	134	152
Camberley	Regional	163	135
Farnborough	**Sub-Regional**	**265**	**89**
Farnham	Sub-Regional	271	88
Bracknell	Sub-Regional	292	84
Fleet	**Major District**	**338**	**74**
Aldershot	**Major District**	**343**	**73**
Wokingham	Major District	360	70
Alton	Major District	532	50
Godalming	District	752	35
Chineham	Minor District	962	28
The Meadows	Minor District	1,061	25
Blackwater Valley, Farnborough	**Local**	**1,263**	**21**
Solartron, Farnborough	**Local**	**1,524**	**17**

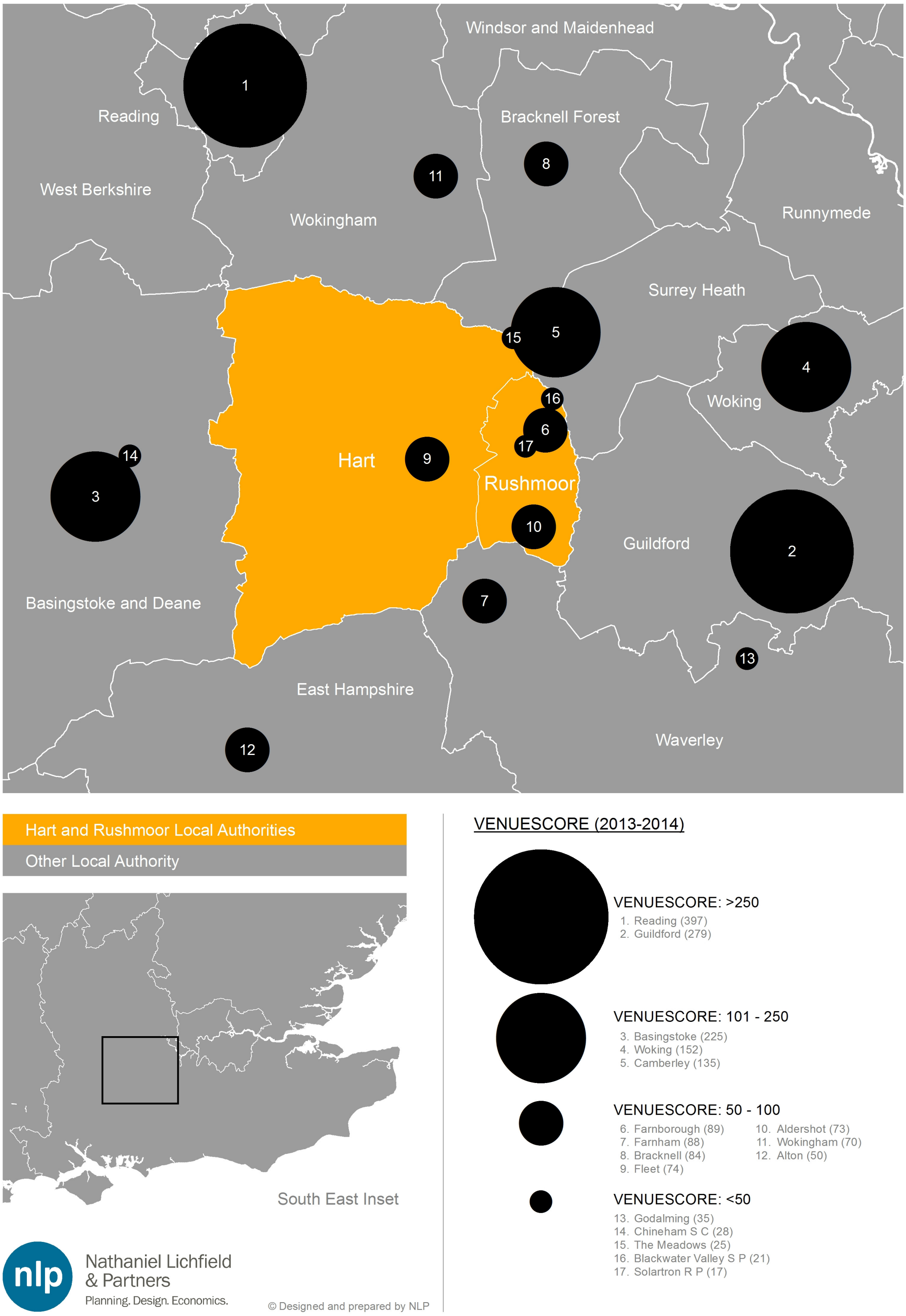
Source: Venuescore, Javelin Group 2013

2.8 The score given does not necessarily reflect the overall size of the centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor stores. For example, department stores such as John Lewis or Debenhams receive a higher score than other multiple operators, which reflects their major influence on non-food shopping patterns. A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not.

2.9 Venuescore also provides eight location grades for centres, and these classifications are based on the centre's score. These range from major city centres, with a score of over 325, of which there are 19, to over 1,400 local centres with a score of 10-21. The larger centres capture an even greater share of consumer spending than is indicated purely based on their Venuescore.

2.10 Farnborough, Aldershot and Fleet are second tier centres that fall within the sub-regional shopping catchment areas of Guildford, Basingstoke and Reading. Farnborough, Aldershot and Fleet compete primarily with other medium sized town centres such as Farnham, Bracknell and Wokingham. Other centres within Hart are not ranked by Venuescore and are much smaller centres that serve more localised catchment areas. The location of these Venuescore centres is shown in Figure 2.1 below.

Figure 2.1 Venuescore Shopping Hierarchy



2.11 Figure 2.1 indicates that residents in Rushmoor and Hart have good access to regional and sub-regional centres, as well as having a choice of smaller centres for day to day shopping needs. The outflow of retail expenditure from Rushmoor and Hart, particularly in terms of comparison goods spending, is relatively high and this is likely to remain high in the future. The existing patterns of spending are considered further in Section 4.0 of this Report.

2.12 Historic data that ranks shopping destination has been obtained from Venuescore, in order to review changes to the position of centres within and around Rushmoor and Hart in the retail hierarchy over time. An analysis of this data is shown in Table 2.2.

Table 2.2 Venuescore UK Shopping Index – Rankings 2006-2013

Centre	Venuescore 2006	Venuescore 2013	2006 Rank	2010 Rank	2013 Rank	2006 – 2013 Rank Change
Reading	270	397	13	10	13	0
Guildford	251	279	19	27	33	- 14
Basingstoke	185	225	58	56	53	+ 5
Woking	130	152	141	125	134	+ 7
Camberley	117	135	170	173	163	+ 7
Farnborough	**125**	**89**	**152**	**254**	**265**	**- 113**
Farnham	72	88	315	260	271	+ 44
Bracknell	104	84	202	243	292	- 90
Fleet	**68**	**74**	**330**	**292**	**338**	**- 8**
Aldershot	**88**	**73**	**248**	**369**	**343**	**- 95**
Wokingham	n/a	70	n/a	366	360	n/a
Alton	n/a	50	n/a	588	532	n/a
Godalming	n/a	35	n/a	699	752	n/a
Chineham	n/a	28	n/a	859	962	n/a
The Meadows	n/a	25	n/a	975	1,061	n/a
Blackwater Valley, Farnborough	**n/a**	**21**	**n/a**	**1,407**	**1,263**	**n/a**
Solartron, Farnborough	**n/a**	**17**	**n/a**	**1,877**	**1,524**	**n/a**

Note: 2006 Rankings only available for major district centres and above

2.13 Table 2.2 above shows that Farnborough and Aldershot have fallen in both Venuescore and rank since 2006. Fleet has also fallen in ranking but has improved its Venuescore over the same period. The 2013 figure for Aldershot is likely to predate the Westgate development, although as this scheme is predominantly food and beverage uses, it would not significantly affect its score.

2.14 There are a number of reasons that may account for the changes in rankings, such as the inclusion of new centres and retail destinations that have opened since 2006, and changes to the way that centres are classified. For example, it may be that the 2006 figure for Farnborough also includes the two Retail Parks, and separating these out would reduce the score for Farnborough town centre. Importantly, it should be emphasised that the scores relate to the presence of national multiple retailers only, and may not reflect the strength of a centre with a high proportion of independent or specialist retailers.

2.15 Notwithstanding this, it is clear that there is a downward trend for the main centres in Rushmoor and Hart, and these centres have not kept pace with other centres in the wider area. Other centres, such as Basingstoke, Woking, Camberley and Farnham, have strengthened and improved their retail offer through investment and development. Centres where very little development has taken place have suffered, and it will be necessary to attract investment and new retailers in order to improve a centre’s overall score and help centres to compete more effectively with competing shopping destinations in the wider area. Conversely, failing to invest in centres will see them continue to fall in the rankings.

2.16 In terms of the wider offer of centres, Venuescore also provides a “foodservice” index for centres across the country, which compares the strength of the food and beverage offer against an index average. Farnborough (72) and Aldershot (87) both achieve an index score lower than the index average of 100, which suggests that there is scope to improve the leisure offer of the town centres. Fleet achieves an index score of 123, suggesting that there is a good food and beverage offer in the centre compared to the average.

The Wider Context

2.17 Centres within Rushmoor and Hart form part of the wider, functional economic area of the Blackwater Valley. The Hart Functional Economic Area Analysis Report, prepared on behalf of Hart District Council in August 2014 defines the Blackwater Valley as consisting of *“an amalgam of closely inter-linked and inter-related settlements, most of which fall within the Aldershot built up area (defined by the Office for National Statistics. The Aldershot Urban Area is defined by the ONS as a continuous urban area with a population of over a quarter million people (252,400 people). It is the 29th largest urban area in England and Wales.”*

2.18 The Blackwater Valley area incorporates the entirety of Rushmoor Borough, the eastern part of Hart District, together with parts of Surrey Heath, Bracknell Forest, Guildford and Waverley. The network of urban areas within the Blackwater Valley include Aldershot, Farnborough, Camberley, Frimley, Fleet, Church Crookham, Blackwater, Yateley, Sandhurst, Badshot Lea and Farnham.

2.19 The Report identifies that another dimension of the economic geography of an area arises from the pattern of retail and leisure spending of an area’s residents and those who come from outside the area to shop. The Report provides a brief assessment of what the retail and leisure expenditure patterns indicate about the economic geography of the Blackwater Valley, and notes that local authorities will need to undertake detailed studies of retail catchment areas when developing their Local Plans and to inform decision on planning for additional retail and leisure facilities.

2.20 The Report considers that the shopping patterns indicate that the Blackwater Valley urban area functions as an integrated local economy.

2.21 Section 4.0 identifies the existing spending patterns for Rushmoor and Hart, based on the results of the household survey, undertaken in September 2014. These results reinforce the conclusions of the Functional Economic Area Analysis and highlight the relationships between the centres in the Blackwater Valley.

3.0 Recent Changes and Retail Trends

Introduction

3.1 The retail capacity projections need to be in line with the latest population data from the 2011 Census and the ONS's latest projections. Local expenditure data and growth projections also need to be applied, along with company average benchmark turnover figures. The capacity projections need to be reviewed in the context of recent retail trends.

3.2 As set out in the next section, as a sensitivity test, the retail capacity assessment has also considered the implications of adopting the population projections within the Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment.

National Policy Context

3.3 National policy relating to retail and town centres is set out in the National Planning Policy Framework (NPPF), March 2012.

3.4 The main policy objective of the NPPF is to ensure the vitality of town centres. The NPPF indicates planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Town centres are expected to be the heart of the community and policies should support their vitality and viability.

3.5 The NPPF requires local authorities to allocate a range of suitable sites to meet the scale and type of retail and other main town centre uses. The NPPF indicates that the need for development should be met in full.

3.6 Sections 4, 5 and 6 of this report assesses the need for new retail and leisure development in Rushmoor and Hart.

3.7 The NPPF indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.8 The National Planning Policy Guidance (NPPG) also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

Retail Trends

3.9 This section considers the changes in the retail sector nationally and the implications for Rushmoor and Hart.

3.10 The economic downturn had a significant impact on the retail sector. A number of national operators have failed (eg. Phones 4 U, Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks, although some of these retailers retain a presence on the high street.

3.11 Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

3.12 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

3.13 An overview of national trends within the retail sector is set out below.

Expenditure Growth

3.14 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.15 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. Modern retailers tend to require larger units than traditional high street shop units, that are a regular shape with a sales area that as far as possible is free of obstructions such as columns. These national trends are anticipated to be mirrored in Rushmoor and Hart.

3.16 For convenience goods, Experian anticipates limited growth up to 2016, but stronger growth thereafter (0.6% per annum). For comparison goods, higher levels of growth are expected in the future (3.3% per annum after 2016), still at a lower rate than previous pre-recession trends.

3.17 Low expenditure growth and deflationary pressures in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014.

New Forms of Retailing

3.18 New forms of retailing (multi-channel shopping) have continued to grow, as an alternative to more traditional shopping. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector may well have implications for retailing within Rushmoor and Hart.

3.19 On-line shopping has experienced rapid growth since the late 1990s, but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. The household survey results suggest 5.0% of households in study area did their last main food and grocery shopping via the internet/delivery, and 5.7% of households do most of their non-food shopping at home via the internet, TV or catalogue. These figures represent a lower proportion than the internet's national share of retail expenditure (about 12.0% in 2013 – Experian, October 2014).

3.20 The internet shopping figures for Rushmoor and Hart do not indicate higher levels of home shopping than the national average, however internet sales should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1.

3.21 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 12.1 (October 2014) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for over a tenth of total retail sales…

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 10.6% in mid-2014 against 4.7% in June 2008...

Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. 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 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But 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. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 18.5% by 2020 rising to 20.3% by the mid-2030s."

3.22 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.23 The implications on the demand for retail space need to be carefully considered. For example, some retailers operate on-line sales from their traditional retail premises eg. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.24 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

3.25 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local and Marks and Spencer's Simply Foods formats). The number of Tesco Express and Sainsbury's Local stores has increased significantly during the last decade, due to the operator's national expansion in this sector, and perhaps also due to the absence of available sites for larger food stores.

3.26 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend for extensions nationally.

3.27 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This is evident in Rushmoor, which currently has a Lidl store in Aldershot, and in Hart, which currently has an Aldi and Lidl store in Blackwater.

3.28 A plan showing the location of the existing main food stores in Rushmoor and Hart is included at Appendix 1.

3.29 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.30 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In many cases charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages. The discount comparison sector has also grown significantly in recent years eg. pound shops.

3.31 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, eg. Reading, Guildford and Basingstoke. Operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.

3.32 The demand for premises within the bulky goods sector, ie. furniture, carpets, electrical and DIY goods, was particularly weak during the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.

3.33 The economic downturn had a significant impact on the retail sector. A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9% before the recession began in 2008 to the current figure of around 12% (source: Experian Goad Plans).

3.34 The continuation of these trends will influence future operator requirements in Rushmoor and Hart's centres with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

3.35 Operator demand for space has decreased during the recession, and of those retailers looking for space, many are likely to prefer to locate in larger centres, particularly multiple retailers. Demand from multiple retailers within Rushmoor and Hart is likely to be weaker particularly in the smaller, district centres, which will affect the appropriate strategies for these centres.

High Street Retail Trends

3.36 The number of shop units within town centres has declined consistently since the early 1970s. The Centre for Retail Research's "Retail In 2018" (CRR) figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. The CRR "Retail In 2018" report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018.

3.37 Online/multi-channel shopping and increasing retail operating costs are cited as the main culprits. Similar predictions of the High Street's decline were made during previous recessions in the early 1980s and 1990s, which subsequently proved to be exaggerated. On this basis, it is important to examine these predictions within the context of longer terms structural trends.

3.38 These trends hide underlying structural changes in the retail sector. These changes are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.39 There is an underlying trend towards fewer but larger retail stores. Valuation Office data indicates the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in on-line shopping.

3.40 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

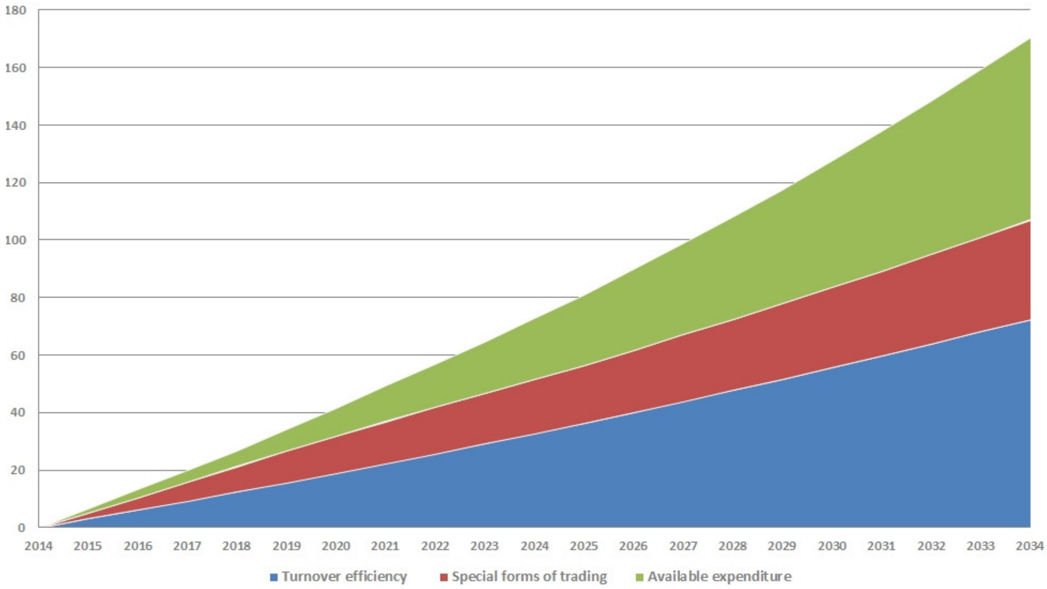
3.41 Experian data indicates that retail expenditure reduced by 1.3% during 2009 to 2012, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street has performed better than out-of-centre retail parks. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 7.1% to 11.5%.

3.42 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by 3.3% per annum, in real terms over and above inflation. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.

3.43 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2.5% per annum for comparison floorspace. Figure 3.1 below shows how much expenditure growth may be available for new development over the next 20 years.

3.44 Allowing for growth in multi-channel shopping and increased turnover efficiency, there could still be approximately £33 billion of growth available for new retail development in England over the next 10 years and £72 billion over the next 20 years.

Figure 3.1: Growth in Comparison Goods Expenditure in England 2014 to 2034 (£ billion)



3.45 The challenge for town centres generally, and centres within Rushmoor and Hart specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.

3.46 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace within Rushmoor and Hart, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

4.0 # Retail Capacity Assessment

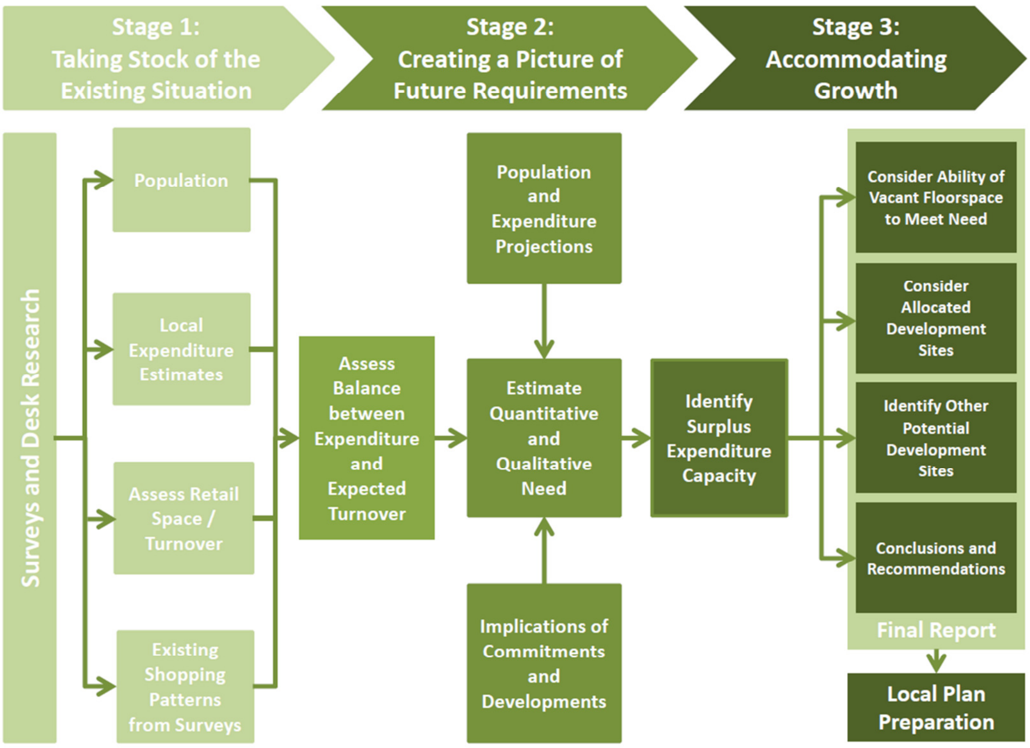
Introduction

4.1 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Rushmoor and Hart in the period from 2014 to 2032. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken and is included within the Part 2 Studies for Rushmoor and Hart.

4.2 The Tables within the Appendices also extend the forecast floorspace needs up to 2037, however the retail capacity assessment concentrates on the period to 2032.

4.3 The methodology is summarised in Figure 4.1 below and set out in more detail in Appendix 1.

Figure 4.1: Methodology for Estimating Future Requirements for Retail Floorspace

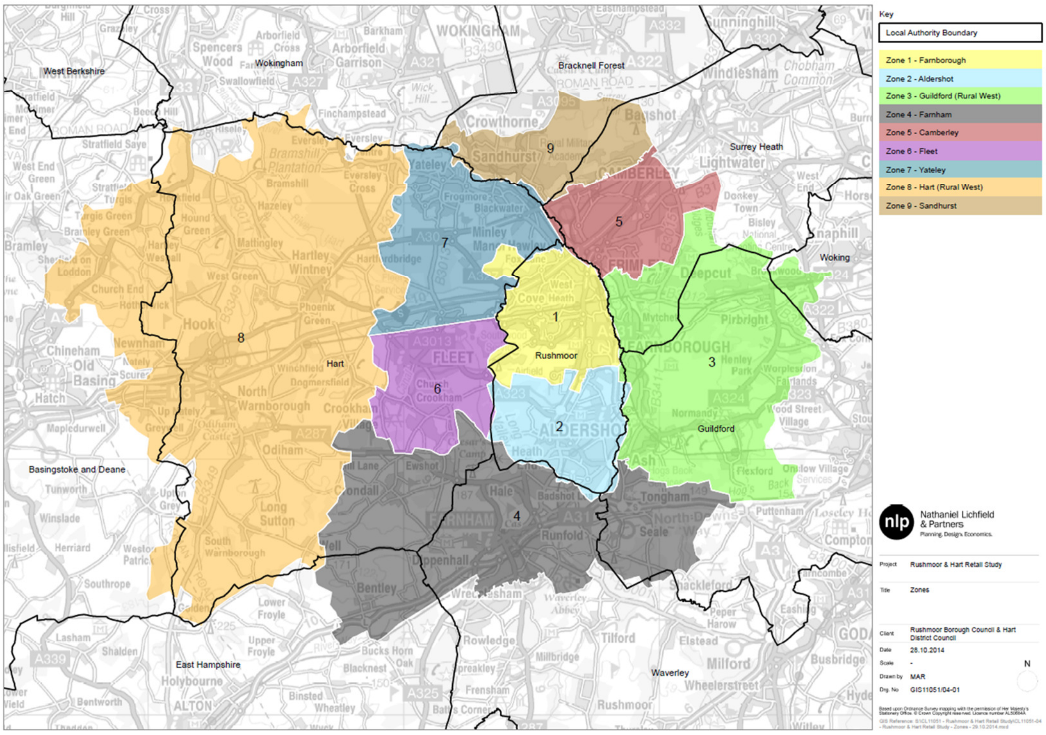


Study Area

4.4 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in Rushmoor and Hart. The study area is sub-divided into nine zones based on postcode sectors, as shown in Appendix 1 and Figure 4.2 overleaf.

4.5 There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure will inflow from surrounding areas.

Figure 4.2: Rushmoor and Hart Study Area



Population and Expenditure

Population

4.6 The study area population for 2011 to 2032 is set out in Table 1 in Appendix 2. The 2011 base year population for each zone has been obtained from Experian MMG3 and projected to 2032 using the latest ONS SNPP 2012 based projections. The total population in the study area is forecast to increase from 326,871 in 2011 to 365,073 in 2032.

4.7 As a separate sensitivity analysis, population projections from the Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment (SHMA) have been applied, in order to assess the implications for retail floorspace requirements if the objectively assessed housing needs are met in full. The SHMA, prepared by Wessex Economics, reviews a range of scenarios in terms of prospective employment growth in the Hart, Rushmoor and Surrey Heath housing market area (HMA). The SHMA concludes that the objectively assessed housing need for the HMA area is for 1,180 homes pa, which equates to 23,600 homes over the period 2011-31 (midpoint employment growth scenario). This level of planned provision allows for a significant uplift in employment growth above past trends, and would more than meet the demographically assessed housing requirement.

4.8 The SHMA identifies a requirement for 468 houses (or 958 people) per annum in Rushmoor and 359 houses (or 796 people) per annum in Hart. Over the period from 2011 to 2032, this equates to 9,822 additional houses in Rushmoor and 7,539 additional houses in Hart. Applying these SHMA figures, the population of Rushmoor is estimated to increase by 20,118 between 2011 and 2032, the population of Hart is estimated to increase by 16,716. A more detailed explanation of the population assumptions adopted is set out in Appendix 1.

4.9 Future population growth within the Rushmoor zones has been redistributed to take into account the AUE. Future population growth within the Hart zones has been redistributed to take into account both the potential new settlement in central Hart and the constraints on growth for the areas of the District affected by the Thames Basin Heaths Special Protection Area. The distribution of the population growth within Rushmoor and Hart, particularly in relation to the Aldershot Urban Extension and potential new settlement in central Hart, and the resulting implications for floorspace needs, is considered later in this section.

4.10 The study area population for 2011 to 2032 using the SHMA population projections is set out in Table 15 in Appendix 2. For the study area as a whole, applying the SHMA figures to the zones in Hart, Rushmoor and Surrey Heath, the total population is forecast to increase from 326,871 in 2011 to 388,499 in 2032. The SHMA projects an additional increase of 23,426 people in the study area over the Plan period compared to the ONS projections.

Expenditure

4.11 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2032. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

4.12 As a consequence of growth in population (using the ONS projections) and per capita spending, total convenience goods spending within the study area is forecast to increase by 17.6% from £694.08 million in 2014 to £816.22 million in 2032, as shown in Table 3 (Appendix 2).

4.13 Comparison goods spending is forecast to increase by 89.4% between 2014 and 2032, increasing from £1,110.78 million in 2014 to £2,104.04 million in 2032, as shown in Table 3 (Appendix 3).

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

4.15 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2014

4.16 Existing convenience goods retail sales floorspace within Rushmoor is around 20,900 sq.m net, and in Hart is around 13,650 sq.m net, as set out in Tables 6A and 6B in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores and excludes small local shops located outside the main centres.

4.17 Comparison goods retail floorspace within Rushmoor is estimated to be about 65,900 sq.m net, and in Hart is around 15,600 sq.m net, as shown in Tables 6A and 6B in Appendix 3. In Rushmoor, around 66% of comparison goods sales floorspace in the Borough is located in Farnborough, and around 26% within Aldershot. In Hart, over 70% of comparison goods sales floorspace is located within Fleet.

Existing Spending Patterns 2014

4.18 The results of the household shopper questionnaire survey undertaken by NEMS in September 2014 have been used to estimate existing shopping patterns within the study area zones.

Convenience Shopping

4.19 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

4.20 Zones 1 and 2 cover Rushmoor Borough, while Hart District covers Zones 6, 7, 8 and part of Zone 4.

4.21 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure retained within Rushmoor and Hart for their respective zones is relatively high. For Rushmoor (Zones 1 and 2), retention is above 70% in each of the zones, and for Hart, retention is between 55% and 76% in Zones 6, 7 and 8.

4.22 Based on NLP's experience from other recent studies, the levels of retention within Rushmoor and Hart are reasonably high, and there appears to be limited scope to increase the retention of convenience goods expenditure.

4.23 The level of convenience goods expenditure attracted to shops/stores in Rushmoor in 2014 is estimated to be £223.73 million as shown in Table 5, Appendix 2. The level of convenience goods expenditure attracted to shops/stores in Hart in 2014 is estimated to be £190.18 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

4.24 The total benchmark turnover of identified existing convenience sales floorspace within Rushmoor based on company average sales densities is £226.78 million (Table 6A, Appendix 2), compared with the actual turnover of

£223.73 million. These figures suggest that convenience retail sales floorspace in the Borough is collectively trading 1.3% below the national average.

4.25 The total benchmark turnover of identified existing convenience sales floorspace within Hart based on company average sales densities is £132.24 million (Table 6B, Appendix 2), compared with the actual turnover of £190.18 million. These figures suggest that convenience retail sales floorspace in the District is collectively trading about 44% above the national average.

4.26 There will be a high number of small convenience stores located outside of the defined centres, particularly in Hart, that would not be captured by the household survey results. The estimated benchmark turnover of existing facilities does not include these stores, and therefore is likely to underestimate the total benchmark turnover for Rushmoor and Hart.

Comparison Shopping

4.27 The estimated comparison goods expenditure currently attracted by shopping facilities within Rushmoor is £399.15 million in 2014, and within Hart is £79.19 million in 2014, as shown in Table 5, Appendix 3. The retention of comparison goods expenditure is lower than for convenience goods shopping because residents will generally shop around more for comparison goods and travel further to visit large shopping destinations e.g. Reading, Guildford and Basingstoke.

4.28 Within Rushmoor, the retention rate for the Borough in Zones 1 and 2 is between 57% and 58%, and within its own zone, Aldershot retains just 30.5%. For Hart, given the much smaller centres, the retention rate for the District is as low as 9% in Zone 7, with the highest retention in Zone 6 (11%). Within its own zone, Fleet retains 31.0%. Overall the comparison expenditure retention rates are reasonable, based on NLP's experience elsewhere, and reflect the influence of higher order centres outside Rushmoor and Hart in close proximity, including Guildford, Basingstoke and Reading.

4.29 Based on the estimate of comparison goods expenditure attracted to facilities within Rushmoor, the average sales density for existing comparison sales floorspace (65,919 sq.m net) is £6,055 per sq.m net. For Hart, the average sales density for existing comparison sales floorspace (15,629 sq.m net) is £5,067 per sq.m net. The higher turnover for Rushmoor is due to the presence of the larger, higher order centres of Farnborough and Aldershot. It should be noted that household survey results tend to over-estimate the importance of the main centres and conversely under-estimate the importance of local centres. Overall comparison retail floorspace within Rushmoor and Hart is trading relatively healthily.

Quantitative Capacity for Convenience Floorspace

4.30 The level of available convenience goods expenditure in 2014, 2018, 2022, 2027 and 2032 is shown at Tables 5 and 8 to 11 in Appendix 2. These projections are based on adjusted market shares from 2018, established from the 2014 household survey results (see shares in Table 4) and amended to take into account retail commitments being implemented by 2018 and 2019, as detailed below.

Rushmoor

4.31 The total level of convenience goods expenditure available for shops in Rushmoor between 2014 and 2032 is summarised in Table 13A in Appendix 2. Allowing for population and expenditure per capita growth (using the ONS projections), convenience goods expenditure available to shopping facilities in the Borough is expected to increase from £223.74 million in 2014 to £263.69 million in 2032, an additional £39.95 million.

4.32 Table 13A subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Retail commitments are added in at 2019. In terms of convenience goods commitments in Rushmoor, these comprise the new local centre within the Aldershot Urban Extension (AUE). The planning permission for the urban extension includes 1,585 sq.m gross (1,110 sq.m net) of convenience goods floorspace (ref. 12/00958/OUT). This retail commitment has been added in at 2019, which is when we understand the AUE local centre will be completed.

4.33 Within Rushmoor, there is an expenditure deficit of -£3.11 million convenience goods expenditure in 2014. This is as a result of the existing facilities in Aldershot and North Camp currently trading below company average. By 2027, there is surplus of available convenience goods expenditure of £14.45 million. Continued future growth produces a surplus of £25.74 million in 2032. Around two thirds of the surplus expenditure in 2032 relates to Farnborough, and a third relates to Aldershot. Throughout the period, there is an expenditure deficit in North Camp, as the benchmark turnover of existing facilities remains higher than the actual spending.

4.34 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14A. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators. No increase in sales density has been assumed for convenience goods, in line with Experian forecasts.

4.35 The short to medium term capacity figures up to 2022 suggest there is a requirement for additional convenience goods floorspace in Farnborough, but nowhere else in the Borough. In the long term, surplus expenditure at 2032 could support 1,980 sq.m net of sales floorspace (2,829 sq.m gross) in the Borough as a whole, as shown in Table 14A, Appendix 2. The breakdown of floorspace requirements for Rushmoor is shown in Table 4.1 below.

Table 4.1: Rushmoor Convenience Goods Floorspace Projections – ONS Population Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Farnborough	391	488	940	1,383
Aldershot	64	- 110	319	737
North Camp	- 161	- 156	- 148	- 141
Other Rushmoor	0	0	1	1
Total	**294**	**222**	**1,112**	**1,980**

4.36 For comparison, the previous retail study in 2010 suggested a convenience goods floorspace requirement for the Borough of up to 2,828 sq.m net by 2019. The updated projections within this study update are significantly lower because of the effects of the recession on expenditure growth between 2010 and 2014 and lower future growth forecasts.

4.37 Table 4.2 below provides a summary of the floorspace requirements for Rushmoor if the higher SHMA population projections are adopted, as set out in Table 17A of Appendix 2.

Table 4.2: Rushmoor Convenience Goods Floorspace Projections – SHMA Population Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Farnborough	522	689	1,245	1,806
Aldershot	456	521	1,256	2,002
North Camp	- 159	- 152	- 142	- 133
Other Rushmoor	0	1	1	2
Total	**819**	**1,058**	**2,360**	**3,677**

4.38 Adopting the SHMA population leads to an increase in the convenience goods floorspace requirements for the Borough as a whole of around 86% from 1,980 sq.m net to 3,677 sq.m net in 2032.

4.39 As a result of the population increase related to the Aldershot Urban Extension, it may be appropriate for Aldershot to seek to increase its market share to serve the new population. Although the Urban Extension includes a local centre with convenience and comparison goods floorspace, and this has been taken into consideration as a retail commitment to absorb some of the forecast growth in expenditure, it is inevitable that the new residents will also use existing facilities in Aldershot town centre, as this is the closest higher order centre to the new settlement. This could therefore justify the provision of additional retail floorspace within Aldershot town centre. The options for accommodating the forecast floorspace requirements are dealt with in detail in the Part 2 Study for Rushmoor.

Hart

4.40 The total level of convenience goods expenditure available for shops in Hart between 2014 and 2032 is summarised in Table 13B in Appendix 2. Allowing for population and expenditure per capita growth, convenience goods expenditure available to shopping facilities in the District is expected to increase from £190.18 million in 2014 to £234.16 million in 2032, an additional £43.98 million.

4.41 Table 13B subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Retail commitments are added in at 2018. In terms of convenience goods commitments in Hart, these comprise the proposed new Sainsbury's store at London Road, Hook (ref. 13/01145/MAJOR). The proposed store (5,081 sq.m gross) has a net sales area of 3,055 sq.m, of which 2,792 sq.m will be convenience goods floorspace.

4.42 Within Hart, there is a surplus of £55.67 million convenience goods expenditure in 2014. The combination of the inclusion of the above commitment and continued future growth in available expenditure produces a surplus of £40.03 million in 2022 and £60.05 million in 2032. The surplus expenditure primarily relates to Blackwater and Fleet.

4.43 As noted above, existing expenditure patterns are based on the results of the household survey. The level of expenditure attracted to Blackwater is surprising given the relatively limited provision of convenience goods stores in the centre, however the household survey results showed a high proportion of trips to the existing Aldi store, which suggests that this store in particular is trading at a level significantly above national average. Conversely, stores in Yateley and Hartley Wintney are shown to be trading below company averages.

4.44 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14B. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators. No increase in sales density has been assumed for convenience goods, in line with Experian forecasts.

4.45 The short to medium term capacity figures up to 2022 suggest there is a requirement for 3,079 sq.m net (4,399 sq.m gross) of additional convenience goods floorspace within the District. In the long term, surplus expenditure at 2032 could support 4,620 sq.m net of sales floorspace (6,599 sq.m gross) in the District as a whole, as shown in Table 14B, Appendix 2. The breakdown of floorspace requirements for Hart is shown in Table 4.3 below.

Table 4.3: Hart Convenience Goods Floorspace Projections – ONS Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Blackwater	2,370	2,499	2,681	2,855
Fleet	887	1,104	1,410	1,698
Hook	- 22	125	330	522
Yateley	- 659	- 606	- 532	- 462
Hartley Wintney	- 56	- 50	- 41	- 33
Odiham	- 6	0	7	15
Other Hart	6	7	16	25
Total	**2,521**	**3,079**	**3,871**	**4,620**

4.46 For comparison, the previous retail study in 2012 suggested a convenience goods floorspace requirement for the District of up to 4,410 sq.m net by 2026. The updated projections within this study update are lower, which is likely to be due to lower future growth rates and the continuing effects of the recession.

4.47 Table 4.4 below provides a summary of the floorspace requirements for Hart if the higher SHMA population projections are adopted, as set out in Table 17B of Appendix 2.

Table 4.4: Hart Convenience Goods Floorspace Projections – SHMA Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Blackwater	2,394	2,535	2,739	2,940
Fleet	1,210	1,495	1,854	2,216
Hook	186	434	773	1,117
Yateley	- 644	- 584	- 498	- 412
Hartley Wintney	- 44	- 32	- 15	3
Odiham	4	15	30	45
Other Hart	10	11	21	31
Total	**3,116**	**3,874**	**4,904**	**5,940**

4.48 Adopting the SHMA population leads to an increase in the convenience goods floorspace requirements for the District as a whole of around 29% from 4,620 sq.m net to 5,940 sq.m net in 2032.

4.49 The potential new settlement in central Hart could accommodate an element of the above floorspace projections, and this is considered further below.

Quantitative Capacity for Comparison Floorspace

4.50 The household survey suggests that the retention of comparison goods expenditure within both Rushmoor and Hart is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities.

4.51 An appropriate strategy for Rushmoor and Hart should be to seek to maintain existing market shares as a minimum, bearing in mind retail development proposals elsewhere. Developments within Rushmoor and Hart should counter-balance the effects of developments in surrounding authorities. The retail capacity projections in Appendix 3 are based on this approach.

Rushmoor

4.52 Available comparison goods expenditure has been projected forward to 2018, 2022, 2027 and 2032 in Tables 7, 8, 9 and 10 in Appendix 3, based on constant market shares and summarised in Table 12A. Available comparison expenditure to facilities within Rushmoor is expected to increase from £399.15 million in 2014 to £752.93 million in 2032.

4.53 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (ie. satisfactory levels), as shown in Table 12A (Appendix 3). Table 12A assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2.5% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

4.54 Retail commitments are added in at 2018 and 2019, as set out in Table 6A of Appendix 3 and summarised below.

4.55 Planning permission was granted in June 2012 (ref. 12/00180/FULPP) for the demolition of the office building and the erection of a new single 4,974 sq.m gross retail unit at Pyramid House, Farnborough. A separate application was approved for the retention and refurbishment the existing retail unit occupied by PC World. Condition 23 attached to planning permission restricts the sale of goods to non-food bulky goods only. Non bulky goods may be sold where they form an ancillary part of the sales operation of the premises (no less than 80% of the new retail floorspace is to be used for the main range of bulky goods).

4.56 A further planning application for this site was approved in April 2014 (ref. 14/00016/FULPP). The revised scheme provides five retail units with mezzanine floors. The size of the units range from 1,230 sq.m to 2,173 sq.m gross and will provide a total of 10,644 sq.m gross (8,866 sq.m net sales area) of retail floorspace, increasing the amount of retail on the site by 7,026 sq.m gross. Units 1-4 are restricted to the sale of non-food bulky goods only, and Unit 5 is restricted to the sale of all goods except food, clothing and shoes. This comparison goods commitment would absorb a significant proportion of the identified comparison goods floorspace requirements for Farnborough over the study period.

4.57 The planning permission for a new local centre within the Aldershot urban extension includes 1,560 sq.m gross (1,092 sq.m net) of comparison goods floorspace (ref. 12/00958/OUT). This commitment has been added from 2019.

4.58 Planning permission has been granted for the redevelopment of northern Queensmead in Farnborough town centre (04/00080/FUL). This included 16,175 sq.m gross of retail floorspace. Blocks 1 and 2 of this development, which include the Sainsbury's supermarket, have been completed and are in operation. Blocks 3 and 4 have not yet been constructed. Block 3 includes an extension to the Debenhams unit, with an increase of 2,746 sq.m gross of retail floorspace, and Block 4 includes 1,300 sq.m gross of new retail floorspace (as amended by planning permission 09/00155/FUL). We have assumed that this comprises comparison goods floorspace. We understand that there are currently pre-application discussions with the applicants regarding a revised Phase 3 of this scheme, however as the existing permission remains extant, it has been included as a commitment in its original form.

4.59 Planning permission has been granted for an extension and rearrangement of the existing Wickes unit at Invincible Road (14/00203/FUL) to create new retail units, which will result in a net increase in retail floorspace of 1,237 sq.m gross.

4.60 Although a planning application has not yet been submitted, a request for a Screening Opinion was submitted to Rushmoor Borough Council in June 2014 (14/00471/SCREEN) for development adjacent to the Princes Mead Shopping Centre which included an indicative layout showing three new units with a total of 2,880 sq.m gross at ground floor level, with the potential for full mezzanine cover within all units. We understand that an application would be for open A1 floorspace, this scheme is likely to be mostly comparison goods floorspace. This site is identified in the 2012 Farnborough Town Centre SPD as suitable for redevelopment. As this is not yet a commitment, this potential scheme has not been taken into consideration in the estimates of comparison goods floorspace requirements. If planning permission is granted for the redevelopment of this site as shown in the Screening Opinion, it could absorb up to 5,750 sq.m gross (including full cover mezzanines) of the identified comparison goods floorspace requirements for Farnborough.

4.61 Within Rushmoor as a whole, assuming that the commitments are implemented, by 2022 there will be an expenditure deficit of -£15.04 million. By 2027, this increases to a surplus of £21.85 million, and by 2032, future expenditure growth generates an expenditure surplus of £70.67 million. Despite the commitments identified above, 79% of this surplus in 2032 is identified for Farnborough. The pipeline scheme for Princes Mead referred to above would absorb a significant proportion of this surplus expenditure.

4.62 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 13A in Appendix 3, adopting average sales densities in 2014 of £5,000 per sq.m, which is projected to grow by 2.5% in the future due to improved turnover efficiency. The surplus expenditure at 2032 could support 9,063 sq.m net of sales floorspace (12,945 sq.m gross).

4.63 The comparison goods floorspace projections for Rushmoor are broken down in Figure 4.5 below.

Table 4.5: Rushmoor Comparison Goods Floorspace Projections – ONS Population Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Farnborough	- 4,942	- 2,410	2,256	7,130
Aldershot	339	- 115	796	1,750
North Camp	22	54	113	176
Other Rushmoor	1	2	4	7
Total	**- 4,580**	**- 2,469**	**3,169**	**9,063**

4.64 For comparison, the previous retail study in 2010 suggested a comparison goods floorspace requirement for Farnborough and Aldershot of 19,576 sq.m net by 2019. The updated projections within this study update are significantly lower because of the effects of the recession on expenditure growth between 2010 and 2014 and lower future growth forecasts. The updated figures within this report also make an allowance for the retail commitments that absorb some of the previously identified capacity.

4.65 Table 4.6 below provides a summary of the floorspace requirements for Rushmoor if the higher SHMA population projections are adopted, as set out in Table 16A of Appendix 3.

Table 4.6: Rushmoor Comparison Goods Floorspace Projections – SHMA Population Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Farnborough	- 3,965	- 738	4,912	10,928
Aldershot	746	660	2,080	3,601
North Camp	34	77	154	236
Other Rushmoor	1	3	5	8
Total	**- 3,184**	**2**	**7,151**	**14,773**

4.66 Adopting the SHMA population leads to an increase in the comparison goods floorspace requirements for the Borough as a whole of around 63% from 9,063 sq.m net to 14,773 sq.m net in 2032.

4.67 As stated above, it may be appropriate for Aldershot to seek to increase its market share, in order to serve the population increase at the Aldershot Urban Extension. The options for accommodating the forecast floorspace requirements are dealt with in detail in the Part 2 Study for Rushmoor.

Hart

4.68 Available comparison goods expenditure has been projected forward to 2018, 2022, 2027 and 2032 in Tables 6, 7, 8 and 9 in Appendix 3, based on constant market shares and summarised in Table 12B. Available comparison expenditure to facilities within Hart is expected to increase from £79.19 million in 2014 to £148.81 million in 2032.

4.69 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (ie. satisfactory levels), as shown in Table 12B (Appendix 3). Table 12B assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2.5% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

4.70 Retail commitments are added in at 2018. In terms of comparison goods commitments in Hart, these comprise the comparison floorspace within the proposed new Sainsbury's store at London Road, Hook (ref. 13/01145/ MAJOR). The proposed store has a net sales area of 3,055 sq.m, of which 263 sq.m will be comparison goods floorspace.

4.71 Within Hart as a whole, by 2022 there will be an expenditure surplus of £3.88 million. This surplus increases to £11.94 million in 2027. By 2032, future expenditure growth generates an expenditure surplus of £22.28 million. 89% of this surplus is identified for Fleet. The implementation of the commitment at Hook results in a deficit of expenditure to support further floorspace in Hook over the period to 2032.

4.72 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 13B in Appendix 3, adopting average sales densities in 2014 of £5,000 per sq.m, which is projected to grow by 2.5% in the future due to improved turnover efficiency. The surplus expenditure at 2032 could support 2,857 sq.m net of sales floorspace (4,082 sq.m gross).

4.73 The comparison goods floorspace projections for Hart are broken down in Figure 4.7 below.

Table 4.7: Hart Comparison Goods Floorspace Projections – ONS Population Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Blackwater	40	97	203	313
Fleet	329	801	1,658	2,538
Hook	- 370	- 345	- 302	- 257
Yateley	18	44	90	138
Hartley Wintney	9	22	44	67
Odiham	7	17	34	52
Other Hart	1	2	5	7
Total	**34**	**637**	**1,732**	**2,857**

4.74 For comparison, the previous retail study in 2012 suggested a convenience goods floorspace requirement for the District of up to 10,720 sq.m net by 2026. The updated projections within this study update are significantly lower, which is likely to be due to lower future growth rates and the continuing effects of the recession.

4.75 Table 4.8 below provides a summary of the floorspace requirements for Hart if the higher SHMA population projections are adopted, as set out in Table 16B of Appendix 3.

Table 4.8: Hart Comparison Goods Floorspace Projections – SHMA Projections

Centre	By 2018 (sq.m net)	By 2022 (sq.m net)	By 2027 (sq.m net)	By 2032 (sq.m net)
Blackwater	59	126	245	372
Fleet	746	1,357	2,333	3,380
Hook	- 345	- 298	- 223	- 143
Yateley	17	40	83	129
Hartley Wintney	21	44	79	118
Odiham	17	37	67	100
Other Hart	1	2	5	7
Total	**516**	**1,308**	**2,589**	**3,963**

4.76 Adopting the SHMA population leads to an increase in the comparison goods floorspace requirements for the District as a whole of around 39% from 2,857 sq.m net to 3,963 sq.m net in 2032.

4.77 The potential new settlement in central Hart could accommodate an element of the above floorspace projections, and this is considered further below.

Potential New Settlement in Central Hart

4.78 In order to meet the identified housing needs for Hart District up to 2032, it is likely that strategic housing allocations need to be made, with the preferred scenario for testing amongst a range of alternatives including a new settlement in central Hart, potentially at Winchfield. We understand that this could theoretically include between 1,800-2,400 homes within the plan period. If this significant housing development takes place, it would be appropriate to direct some of the identified retail floorspace requirements for the District to serve this location.

4.79 Table 4.9 below estimates the retail expenditure that could be generated by this residential development in total, and then estimates how much of this spending that could realistically be retained within any local provision provided within the development. Table 4.9 converts retained expenditure into floorspace requirements. In undertaking these calculations, the following assumptions have been made:

1 the needs of the new residential development has been considered in isolation, with no inflow from existing residents in the surrounding area;

2 development of between 1,800 and 2,400 homes will be completed by 2032, and an average household size of 2.48 (the mid-point of average household size suggested in the SHMA, Appendix E) for the proposed new development is adopted;

3 available convenience and comparison goods expenditure per person is based on the average for the nine study area zones in 2032 (Table 2, Appendix 2 and 3);

4 not all of the convenience and comparison goods expenditure will be available to support local retail facilities in the proposed new housing development, as expenditure will continue to be attracted to other centres and existing superstores;

5 given the size of the residential developments and using our judgement based on schemes elsewhere, up to 25% of convenience goods expenditure and 10% of comparison goods expenditure could be retained to support the proposed local retail floorspace;

6 for convenience goods, the estimated retention figure reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided;

7 for comparison goods, a much lower proportion of available expenditure will be retained, recognising that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy; and

8 an average sales density for local shopping facilities of £5,000 per sq.m have been applied, to convert the retained expenditure to floorspace requirements.

Table 4.9: Potential Retail Floorspace Requirements within New Settlement in central Hart

	New Settlement at Winchfield
Population	
No. of dwellings	2,100
Average household	2.48
Total Population	5,208
Convenience Goods	
Convenience Goods Expenditure per capita (2032)	£2,251
Total Available Convenience Goods Expenditure	£11.72 million
Retained Convenience Goods Expenditure (25%)	£2.93 million
Convenience Goods Floorspace Turnover, £ per sq.m	£5,000
Floorspace sq.m net	586 sq.m net
Floorspace sq.m gross	837 sq.m gross

	New Settlement at Winchfield
Comparison Goods	
Comparison Goods Expenditure per capita (2032)	£5,816
Total Available Comparison Goods Expenditure	£30.29 million
Retained Comparison Goods Expenditure (10%)	£3.03 million
Comparison Goods Floorspace Turnover, £ per sq.m	£5,000
Floorspace sq.m net	606 sq.m net
Floorspace sq.m gross	808 sq.m gross

4.80 The provision of local shopping facilities is appropriate within developments of this size, in order to ensure residents have day to day shops and services within walking distance of their home, which will reduce car travel.

4.81 Table 4.9 indicates that the number of new dwellings proposed is sufficient to support around 1,645 sq.m gross of retail floorspace. This is similar in scale to Odiham. A centre of this size would account for a significant proportion of the District's total retail (Class A1) floorspace projection up to 2032.

4.82 Centres of this scale would not be capable of meeting both main and top-up convenience shopping needs. Typically, local centres serving relatively small catchments would primarily serve top-up food shopping needs. Local centres may typically include a small convenience store under the Sunday Trading Act threshold (280 sq.m net), supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.

4.83 The figures in Table 4.9 suggest a total requirement of around 1,645 sq.m gross of retail floorspace. Non-retail services (Class A2 to A5) could increase the size of centre to over 2,000 sq.m gross.

4.84 Although the population within a new settlement could potentially support a local centre, it is essential to ensure that any local centre proposed is both commercially viable and capable of delivery. Further work would need to be produced to support any planning application for retail floorspace in this location to demonstrate that the development proposed is appropriate in terms of its scale and position within the development, the context of the surrounding area, and whether it is likely to be of interest to retailers.

5.0 Requirements for Other Town Centre Uses

Introduction

5.1 This section assesses the potential for commercial leisure and other town centre uses in Rushmoor and Hart, including for a cinema, tenpin bowling, bingo, theatres, nightclubs, private health and fitness clubs and catering, pubs and bars.

Commercial Leisure Uses

5.2 Residents in Rushmoor and Hart have relatively good access to range of commercial leisure and entertainment, including facilities in neighbouring authorities, where most of the key sectors are represented.

5.3 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

5.4 Rushmoor and Hart's population has good access to major leisure facilities in Basingstoke, Camberley, Guildford and Reading. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities.

Cinemas

5.5 The only mainstream cinema within Rushmoor and Hart is the Cineworld in Aldershot. This cinema has seven screens and 1,145 seats.

5.6 In total, around 70% of respondents to the household survey results visit the cinema, and of these, 34% visited the cinema in Aldershot. Camberley (41%) and Basingstoke (11%) were the other main cinema destinations.

5.7 The capacity for cinema seats within Rushmoor and Hart is calculated in Appendix 4. The study area population in 2014 (333,852 people) will generate 934,785 cinema trips per annum, based on the national average visitation rate (2.8 trips per annum). The market shares estimated from the household survey suggests about 309,486 of these cinema trips will be attracted to the cinema in Aldershot, or 343,873 trips allowing for 10% inflow (see Tables 2 to 4 in Appendix 4).

5.8 Based on the national average population per cinema screen (47,000 people per screen) and per cinema seat (232 people per seat), 343,873 million trips generates demand for seven cinema screens or 1,482 cinema seats. The existing cinema in Aldershot has seven screens and 1,145 seats. These figures suggest that the number of cinema screens is appropriate within

Rushmoor, however there is a slight under-supply of 337 seats in Rushmoor in 2014 (see Tables 10 and 11 in Appendix 4).

5.9 Planning permission has been granted for a new cinema in Farnborough (ref. 12/00002/FUL) as an extension to the Kingsmead Shopping Centre. This is now under construction and due to open later in 2015. This proposes seven screens with 899 seats. Future market shares have been adjusted to take this commitment into account, and the number of trips generated by the study area population at 2018, 2022, 2027 and 2032 is shown in Tables 6 to 9 in Appendix 4. The number of trips attracted to Rushmoor is expected to increase from 343,873 in 2014 to 536,140 in 2032.

5.10 Based on the national average visitation rate, the study area population at 2032 could generate demand for 11 cinema screens or 2,311 cinema seats within Rushmoor. This suggests that once the consent in Farnborough opens , there is no need for any additional cinema screens. There is however potential for an additional and 267 cinema seats within Rushmoor over the Plan period.

5.11 Using the SHMA population projections (Tables 13 and 14), the potential requirement for cinema seats in Rushmoor increases to 437 by 2032.

5.12 For Hart, where there are currently no cinemas, we have estimated the theoretical demand for cinema provision within the District, based on the comparison goods household shares that are currently attracted to facilities within Hart (Table 5, Appendix 4). Applying these shares, the number of potential trips attracted to Hart could increase from 67,731 in 2018 to 71,992 in 2032. Based on the national average visitation rate, this number of trips could generate demand for two cinema screens or 310 cinema seats within Hart by 2032. This suggests that Hart could support a small cinema over the Plan period.

5.13 Using the SHMA population projections (Tables 13 and 14), Hart could support two cinema screens or 332 cinema seats by 2032.

Theatres

5.14 57.7% of respondents to the household survey indicated that they visited theatres, and this is the fourth most popular leisure activity. This figure is higher than NLP's average for other surveys of 42.5%. When asked where they had lasted visited the theatre, London (39.6%) was the most popular location, followed by Woking (25.6%). 7.7% of respondents last visited the theatre in Aldershot, while 7.2% visited Guildford and 7.0% visited Camberley.

5.15 Aldershot contains two theatres – Princes Hall and the West End Centre, and Fleet contains The Harlington.

5.16 There is no clear need for additional theatre provision, and existing facilities within Rushmoor and Hart and surrounding centres are popular and well used. However if proposals were brought forward for additional facilities, they should be supported as they would enhance the overall offer of centres within Rushmoor and Hart.

Private Health and Fitness Clubs

5.17 The household survey indicates that 38.5% of respondents or their families visit a health/fitness club. Of these, around 34% visit health and fitness facilities within Rushmoor and around 21% visit facilities within Hart.

5.18 There are a number of gyms and health clubs within Rushmoor and Hart, as highlighted by the household survey results and summarised in Table 5.1 below.

Table 5.1: Rushmoor and Hart Health and Fitness Clubs

Rushmoor Health and Fitness Clubs
Farnborough Leisure Centre, Westmead, Farnborough
The Gym, The Mead Shopping Centre, Farnborough
Spirit Health Club, Farnborough
Ash Manor Sports Centre, Aldershot
Curves, Aldershot
CrossFit, Aldershot
Farnborough Weight Training Club, Farnborough
Blackwater & Hawley Leisure Centre, Blackwater
Connaught Leisure Centre, Aldershot
Aldershot Garrison Sports Centre, Aldershot
Hart Health and Fitness Clubs
Hart Leisure Centre, Fleet
Frogmore Leisure Centre, Yateley
Eversley Indoor Cricket Centre, Hook
Results Health Club, Fleet

5.19 The adult (over 16) population of the study area (approximately 267,600 in 2014) could generate demand for about 32,100 public and private gym membership places, based on the national average membership rate (12%). Information provided by Sport England's Local Sport Profile Tool suggests that the proportion of adults in Rushmoor (59.5%) and Hart (62.5%) who are physically active is higher than the England average (56.6%). Similarly, the levels of participation in sport (at least once a week) in Rushmoor (41.7%) and Hart (41.7%) are higher compared to the England average of 35.7%. It is reasonable to adopt the national average membership and participation rates in assessing potential need for facilities.

5.20 Using the market shares from the household survey suggests that of the potential memberships, around 10,900 (34%) use facilities in Rushmoor and 6,700 (21%) use facilities in Hart. These potential membership estimates suggest that the ten facilities in Rushmoor have an average membership of around 1,090 per club, and the four facilities in Hart have an average membership of around 1,675. The national average for private fitness clubs members is 1,375 members. These figures indicate that there is an adequate supply of gyms and health clubs within Rushmoor, but there may be a need for further facilities in Hart.

5.21 The adult population within the study area is expected to increase by about 25,000 between 2014 and 2032, which would generate around 3,000 new health club members, of which 1,020 (34%) should be attracted to Rushmoor and 630 (21%) should be attracted to Hart, based on existing market shares. These figures suggest that there could be demand for a new health and fitness club in Rushmoor to meet this growth in demand up to 2032. While there is not likely to be a need for any new facilities in Hart, the assessment above identifies that existing facilities in Hart are oversubscribed, and suggests the provision of a new facility would meet existing and future demand.

5.22 Using the SHMA population projections, the adult population is expected to increase by around 41,000 between 2014 and 2032. This could generate around 5,000 new health club members, of which 1,700 (34%) should be attracted to Rushmoor and 1,000 (21%) should be attracted to Hart. Again, these figures suggest that there is demand for a new health and fitness club in Rushmoor, and could potentially support a new facility in Hart.

Tenpin Bowling

5.23 There are two tenpin bowling facilities in Rushmoor – Farnborough Bowl (10 lanes) and MFA Bowl in Aldershot (16 lanes). There are no tenpin bowling facilities located in Hart. The household survey results suggest that 34.7% of households in the study area visit tenpin bowling facilities. 36% of these respondents visit the facilities in Rushmoor. A small number of respondents mentioned facilities in Hart, however it is not clear what facilities these responses referred to. Camberley was the most popular tenpin bowling destination in the study area as a whole.

5.24 The population of the study area is 333,852 in 2014. This population as a whole could theoretically support 28 lanes, based on one lane per 12,000 people (national average). Population growth within the study area (31,221 between 2014 and 2032), could support a further 2-3 lanes by 2032.

5.25 Population growth in the study area using the SHMA population projections (52,313 between 2014 and 2032) suggests that around 4 additional lanes could be supported by 2032.

5.26 However, given the provision of bowling facilities in Farnborough and Aldershot, and nearby Camberley, these figures suggest that the existing tenpin bowling facilities adequately meet the needs of Rushmoor and Hart for the foreseeable future.

Bingo

5.27 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (ie. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).

5.28 Within Rushmoor, there is a Gala Bingo facility in Aldershot, while there are no major bingo clubs located in Hart. The household survey results indicated that 3.5% of households in the study area visit bingo facilities, and of these, around 41% visited bingo facilities in Rushmoor. 12.4% also mentioned facilities in Hart, however it is not clear what facilities these responses referred to. The national average bingo visitation rate is around 5%.

5.29 The adult (over 18) population of the study area (approximately 259,100 in 2014) could generate about 453,400 admissions based on the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the study area population could support four bingo facilities. Planning permission has been granted for a new bingo hall adjacent to the existing Iceland store in Farnborough town centre.

5.30 There may be scope to provide additional bingo facilities within Rushmoor and Hart to meet the existing and likely future demand, although nearby facilities in Camberley and Bracknell will meet some of these needs.

Nightclubs

5.31 The value of the nightclub market is around £2 billion in 2014 with around 7,000 businesses (source: IBIS World), about one per 8,500 people. Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Legislation that has extended licensing hours for other drinking establishments and banned smoking indoors in public buildings has removed the industry's main competitive advantage. Customers can now stay visit pubs or bars. Nightclubs have also come under pressure from the economic downturn.

5.32 The household survey results indicated that 8.1% of households in the study area visit nightclubs and 24.3% of these households last visited a nightclub in Fleet. The only other nightclub destination mentioned in Rushmoor and Hart was Aldershot, visited by just one respondent. The most popular other destinations mentioned were Camberley, Guildford, London and Reading.

5.33 The existing provision of nightclubs comprises Jaxx in Fleet and Tiffanys in Aldershot. This provision, along with the large nightclubs located in larger, nearby centres, may limit the potential for additional large nightclubs in centres in Rushmoor and Hart, however smaller facilities may be viable.

Other Services, Restaurants, Bars and Takeaways

5.34 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

5.35 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) ie. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Coffee Republic. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

5.36 The key categories for food and beverage offers are:

1. **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
2. **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
3. **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
4. **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

5.37 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

Food and Beverage Expenditure

5.38 Experian's latest 2013 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2, Appendix 5. These figures indicate that the average expenditure in the study area for food and beverages consumed away from the home plus takeaways eaten at home is £1,232 per capita in 2014. The total food and beverage expenditure in the study area is £406.35 million in 2014, using the ONS population projections (Table 3, Appendix 5).

5.39 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 28% between 2014 and 2032. Taking into account population growth, total food and drink expenditure within the study area is expected to increase from £406.35 million in 2014 to £569.24 million in 2032, an increase of about 40% (Table 3, Appendix 5).

Food and Beverage Expenditure Patterns

5.40 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2014) penetration rates are shown in Table 4, Appendix 5 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Rushmoor is £78.10 million in 2014 and within Hart is £108.31 million.

5.41 The retention rate in Rushmoor is reasonably high in Zones 1 and 2, with 40.6% and 63.9% respectively. Hart retains between 52.2% and 73.0% in Zones 6 - 8. There is likely to be limited potential to increase market share in the future.

Future Food and Beverage Capacity

5.42 The household survey suggests that Rushmoor and Hart's retention of food and beverage expenditure is reasonably high. An appropriate strategy is to seek to maintain existing market shares, and the capacity projections in Appendix 5 are based on this approach.

5.43 Available food and beverage expenditure has been projected forward to 2032 based on constant 2014 market shares in Tables 6 to 9. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Tables 11A and 11B in Appendix 5.

5.44 Surplus expenditure has been converted into floorspace projections in Table 12, Appendix 5, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 5.2 below.

Table 5.2 Food and Drink Floorspace Projections – ONS Population Projections

Area	Floorspace (sq.m gross)			
	By 2018	By 2022	By 2027	By 2032
Farnborough	261	446	670	890
Aldershot	405	692	1,039	1,379
North Camp	57	97	145	192
Other Rushmoor	16	27	40	53
Rushmoor Total	**739**	**1,261**	**1,894**	**2,513**
Blackwater	33	57	84	111
Fleet	558	954	1,414	1,848
Hook	46	79	117	153
Yateley	102	174	258	337
Hartley Wintney	132	226	335	437
Odiham	129	221	328	427
Other Hart	61	105	156	205
Hart Total	**1,061**	**1,816**	**2,692**	**3,518**

5.45 The planning permission for a new cinema within Farnborough town centre (ref. 12/00002/FUL) also includes 721 sq.m gross of food and beverage floorspace, and once implemented, this would absorb some of the food and beverage floorspace projections for Farnborough identified above.

5.46 Table 5.3 below provides a summary of the floorspace requirements if the higher SHMA population projections are adopted, as set out in Table 15 of Appendix 5.

Table 5.3 Food and Drink Floorspace Projections – SHMA Population Projections

Area	Floorspace (sq.m gross)			
	By 2018	By 2022	By 2027	By 2032
Farnborough	346	599	916	1,238
Aldershot	679	1,205	1,860	2,526
North Camp	65	112	170	228
Other Rushmoor	16	28	41	54
Rushmoor Total	**1,106**	**1,944**	**2,987**	**4,046**
Blackwater	36	60	91	122
Fleet	893	1,398	1,944	2,499
Hook	74	129	196	263
Yateley	96	155	228	301
Hartley Wintney	231	403	614	828
Odiham	220	387	591	797
Other Hart	88	147	214	281
Hart Total	**1,638**	**2,679**	**3,878**	**5,091**

Other Class A1 and A2 Service Uses

5.47 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these uses within centres, or about 10% of total floorspace.

Conclusions

5.48 It is important to maintain a reasonable proportion of leisure and service uses in Rushmoor and Hart and additional floorspace and facilities should be provided over the plan period.

5.49 The commercial leisure assessment in this sections suggests:

1 current and proposed cinema provision within Rushmoor is sufficient and there is limited scope for additional provision. Hart could potentially support a small cinema.

2 there could be scope for about one additional health and fitness club each in Rushmoor and Hart over the study period to meet existing and future demand;

3 there is no need for additional theatre facilities, tenpin bowling, bingo or nightclubs in Rushmoor and Hart over the study period as existing provision is sufficient to meet likely future needs;

4 there is a requirement for around an additional 2,500 sq.m gross of food and beverage floorspace in Rushmoor and 3,500 sq.m gross in Hart over the study period to 2032, using the ONS population projections. Adopting the SHMA population projections, these floorspace requirements increase to 4,000 sq.m gross for Rushmoor and 5,100 sq.m gross for Hart.

6.0 Recommendations and Conclusions

Introduction

6.1 This Study provides an assessment of the development needs of Rushmoor Borough and Hart District for retail, leisure and town centre uses. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Rushmoor and Hart

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period, ie. up to 2032.

6.3 When planning for growth in their centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Part 2 of the Retail, Leisure and Town Centres Study will provide an audit and review of the existing centres within the two separate authorities, as well as identifying the capacity of centres to accommodate the new town centre development requirements, as required by the NPPF.

6.5 Long term forecasts up to and beyond 2027 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review.

6.6 The implications of major retail development within and surrounding Rushmoor and Hart should be monitored along with the effect proposals may have on the demand for additional development.

Floorspace Projections

6.7 The floorspace projections for Rushmoor and Hart are summarised below, using the two population scenarios.

Convenience Goods - Rushmoor

6.8 The convenience goods projections (over and above commitments), based on adjusted market shares following the implementation of the commitments, suggest new floorspace within Rushmoor as follows:

Table 6.1: Rushmoor Convenience Goods Retail Floorspace Projections – ONS Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	558	140	646	631	1,975
Aldershot	n/a	n/a	456	597	1,053
North Camp	n/a	n/a	n/a	n/a	n/a
Other Rushmoor	n/a	n/a	1	n/a	1
Rushmoor Total	**558**	**140**	**1,103**	**1,228**	**3,029**

Source: Table 14A, Appendix 2

Table 6.2: Rushmoor Convenience Goods Retail Floorspace Projections – SHMA Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	746	238	795	801	2,580
Aldershot	651	93	1,050	1,066	2,860
North Camp	n/a	n/a	n/a	n/a	n/a
Other Rushmoor	1	n/a	1	1	3
Rushmoor Total	**1,398**	**331**	**1,846**	**1,868**	**5,443**

Source: Table 17A, Appendix 2

Note: Negative floorspace requirements removed

6.9 As noted at para. 4.39 above, as a result of the population increase related to the Aldershot Urban Extension, it may be appropriate for Aldershot to seek to increase its market share to serve the new population. The options for accommodating the forecast floorspace requirements are dealt with in detail in the Part 2 Study for Rushmoor.

Convenience Goods - Hart

6.10 The convenience goods projections (over and above commitments), based on adjusted market shares following the implementation of the commitments, suggest new floorspace within Hart as follows:

Table 6.3: Hart Convenience Goods Retail Floorspace Projections - ONS Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Blackwater	3,385	185	259	249	4,078
Fleet	1,268	309	437	412	2,426
Hook	n/a	179	292	275	746
Yateley	n/a	n/a	n/a	n/a	n/a
Hartley Wintney	n/a	n/a	n/a	n/a	n/a
Odiham	n/a	n/a	11	10	21
Other Hart	9	n/a	14	12	35
Hart Total	**4,662**	**673**	**1,013**	**958**	**7,306**

Source: Table 14B, Appendix 2

Table 6.4: Hart Convenience Goods Retail Floorspace Projections - SHMA Population Projections

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Blackwater	3,420	202	290	288	4,200
Fleet	1,729	407	513	517	3,166
Hook	265	355	485	491	1,596
Yateley	n/a	n/a	n/a	n/a	n/a
Hartley Wintney	n/a	n/a	n/a	4	4
Odiham	6	16	21	21	64
Other Hart	14	2	14	14	44
Hart Total	**5,434**	**982**	**1,323**	**1,335**	**9,074**

Source: Table 17B, Appendix 2

Note: Negative floorspace requirements removed

6.11 As identified at Table 4.9, around 840 sq.m gross of convenience goods floorspace could be directed towards the potential new settlement in central Hart. The options for accommodating the forecast floorspace requirements and the redistribution of floorspace is considered further in the Part 2 Study for Hart.

Comparison Goods - Rushmoor

6.12 The comparison goods projections (over and above commitments), based on constant markets shares, suggest new floorspace requirements for Rushmoor as follows:

Table 6.5: Rushmoor Comparison Goods Retail Floorspace Projections – ONS Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	n/a	n/a	3,223	6,962	10,185
Aldershot	n/a	n/a	1,137	1,363	2,500
North Camp	31	46	84	90	251
Other Rushmoor	1	2	3	4	10
Rushmoor Total	**32**	**48**	**4,447**	**8,419**	**12,946**

Source: Table 13A, Appendix 3

Table 6.6: Rushmoor Comparison Goods Retail Floorspace Projections – SHMA Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	n/a	n/a	7,017	8,595	15,612
Aldershot	n/a	943	2,029	2,172	5,144
North Camp	48	62	110	117	337
Other Rushmoor	2	2	4	4	12
Rushmoor Total	**50**	**1,007**	**9,160**	**10,888**	**21,105**

Source: Table 16A, Appendix 3

Note: Negative floorspace requirements removed

6.13 As noted at para. 4.67 above, it may be appropriate for Aldershot to seek to increase its market share, in order to serve the population increase at the Aldershot Urban Extension. The options for accommodating the forecast floorspace requirements are dealt with in detail in the Part 2 Study for Rushmoor.

Comparison Goods - Hart

6.14 The comparison goods projections (over and above commitments), based on constant markets shares, suggest new floorspace requirements for Hart as follows:

Table 6.7: Hart Comparison Goods Retail Floorspace Projections - ONS Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Blackwater	57	82	151	157	447
Fleet	469	675	1,224	1,257	3,625
Hook	n/a	n/a	n/a	n/a	n/a
Yateley	26	37	66	68	197
Hartley Wintney	13	18	32	33	96
Odiham	10	14	25	25	74
Other Hart	1	2	4	3	10
Hart Total	**576**	**828**	**1,502**	**1,543**	**4,449**

Source: Table 13B, Appendix 3

Table 6.8: Hart Comparison Goods Retail Floorspace Projections - SHMA Population Projections

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Blackwater	85	95	170	182	532
Fleet	1,066	873	1,394	1,496	4,829
Hook	n/a	n/a	n/a	n/a	n/a
Yateley	24	32	62	67	185
Hartley Wintney	31	31	52	54	168
Odiham	25	27	44	47	143
Other Hart	1	2	4	4	11
Hart Total	**1,232**	**1,060**	**1,726**	**1,850**	**5,868**

Source: Table 16B, Appendix 3

Note: Negative floorspace requirements removed

6.15 As identified at Table 4.9, around 810 sq.m gross of comparison goods floorspace could be directed towards the potential new settlement in central Hart. The options for accommodating the forecast floorspace requirements and the redistribution of floorspace is considered further in the Part 2 Study for Hart.

Food and Beverage

6.16 The Class A3/A5 food/beverage services projections, suggest new floorspace could be distributed as follows:

Table 6.9: Food and Beverage Floorspace Projections – ONS Population Projections

Location	Additional Food and Beverage Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	261	185	224	220	890
Aldershot	405	287	347	340	1,379
North Camp	57	40	48	47	192
Other Rushmoor	16	11	13	13	53
Rushmoor Total	**739**	**523**	**633**	**619**	**2,513**
Blackwater	33	24	27	27	111
Fleet	558	396	460	434	1,848
Hook	46	33	38	36	153
Yateley	102	72	84	79	337
Hartley Wintney	132	94	109	102	437
Odiham	129	92	107	99	427
Other Hart	61	44	51	49	205
Hart Total	**1,061**	**755**	**876**	**826**	**3,518**

Source: Table 12, Appendix 5

Table 6.10: Food and Beverage Floorspace Projections – SHMA Population Projections

Location	Additional Food and Beverage Floorspace (sq.m gross)				
	2014-2018	2018-2022	2022-2027	2027-2032	Total 2014-2032
Farnborough	346	253	317	322	1,238
Aldershot	679	526	655	666	2,526
North Camp	65	47	58	58	228
Other Rushmoor	16	12	13	13	54
Rushmoor Total	**1,106**	**838**	**1,043**	**1,059**	**4,046**
Blackwater	36	24	31	31	122
Fleet	893	505	546	555	2,499
Hook	74	55	67	67	263
Yateley	96	59	73	73	301
Hartley Wintney	231	172	211	214	828
Odiham	220	167	204	206	797
Other Hart	88	59	67	67	281
Hart Total	**1,638**	**1,041**	**1,199**	**1,213**	**5,091**

Source: Table 15, Appendix 5

6.17 As with the convenience and comparison goods floorspace requirements, it may be appropriate for an element of food and beverage floorspace to be redistributed. In Rushmoor, this could mean that additional floorspace is directed towards Aldershot, to cater for the new population within the Aldershot Urban Extension. For Hart, an element of food and beverage floorspace (around 350 sq.m gross) should be incorporated within a local centre to serve the potential new settlement at central Hart.

6.18 The options for accommodating the forecast floorspace requirements and the redistribution of floorspace is considered further in the Part 2 Studies for Rushmoor and Hart.

Future Strategy Implementation and Monitoring

6.19 There are a number of broad areas of possible action Rushmoor Borough and Hart District could pursue in order to maintain and enhance the role of shopping centres within the respective authorities, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining, or improving where necessary, the generally high quality environment within each centre; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

6.20 The Strategy for each individual authority will be addressed in more detail in Part 2 of the Retail, Leisure and Town Centres Study.

6.21 The recommendations and projections within this study are expected to assist the Councils in reviewing development plan policies over the coming years and to assist development control decisions during this period. The Study provides a broad overview of the potential need for further retail development in the short – medium term up to 2022, with longer term forecast up to 2027 and 2032. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2032 should be treated with caution.

6.22 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

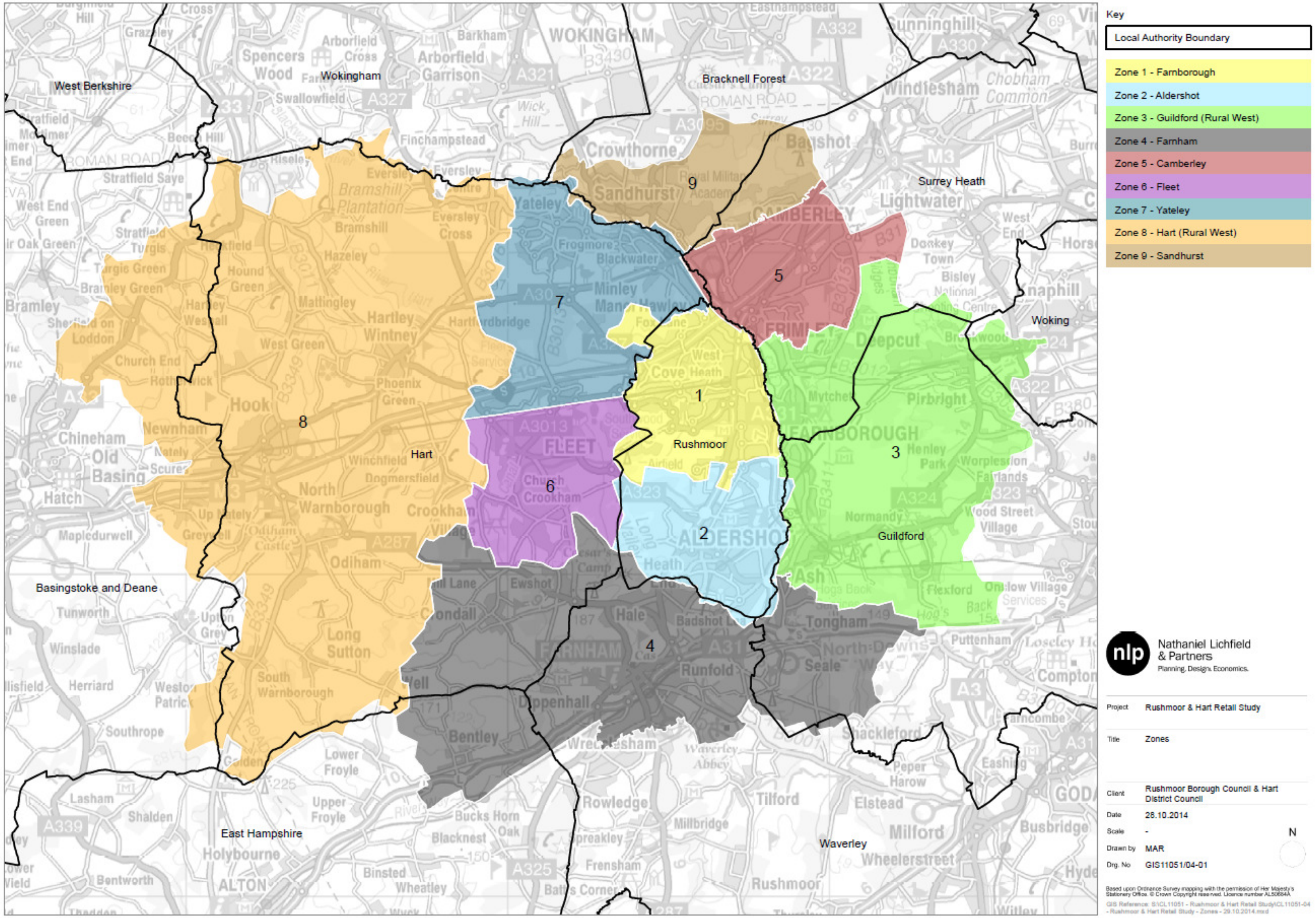
6.23 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Methodology

Table A1.1: Rushmoor and Hart Study Area Zones

Zone	Postcode Sectors	
Zone 1 - Farnborough	GU14 0 GU14 6 GU14 7 GU14 8	GU14 9
Zone 2 - Aldershot	GU11 1 GU11 2 GU11 3 GU12 4	
Zone 3 - Guildford (Rural West)	GU3 2 GU12 5 GU12 6 GU16 6	GU24 0
Zone 4 - Farnham	GU9 0 GU9 7 GU9 8 GU9 9	GU10 1 GU10 5
Zone 5 - Camberley	GU15 1 GU15 2 GU15 3 GU16 7	GU16 8 GU16 9 GU96 1
Zone 6 - Fleet	GU51 3 GU51 4 GU51 5 GU52 0	GU52 6 GU52 7 GU52 8 GU52 9
Zone 7 - Yateley	GU17 0 GU17 9 GU46 6 GU46 7	GU51 1 GU51 2
Zone 8 - Hart (Rural West)	RG27 0 RG27 8 RG27 9 RG29 1	
Zone 9 - Sandhurst	GU15 4 GU47 0 GU47 8 GU47 9	

Plan A1.1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2013 prices, consistent with Experian's base year expenditure figures for 2013 (Retail Planner Briefing Note 12.1, October 2014) which is the most up to date information available.

Study Area

2 Having reviewed the zones used for the previous Rushmoor and Hart Studies, the zones have been redrawn. The study area has been sub-divided into nine zones, based on postcode sectors, as shown above. The redrawn zones better reflect the extent of Rushmoor and Hart's primary catchment area.

Retail Expenditure

3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2013 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 12.1) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

5 Experian's EBS growth forecast rates for 2013 to 2016 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.5% for 2013 to 2014, +0.4% for 2014 to 2015 and +0.6% for 2016; for comparison goods: +5.6% for 2013-2014, +4.4% for 2014-2015 and +3.1% for 2016.

6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted ie. 0.6% per annum for convenience goods after 2016 and 3.3% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes

other forms of retail expenditure not spent in shops eg. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2013 is:

- 7.6% of convenience goods expenditure; and
- 14.7% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2013 are:

- 2.3% of convenience goods expenditure; and
- 11.1% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 4.6% and 16.0% by 2022 respectively, and estimated at 5.7% and 15.5% by 2032. These figures have been adopted in this assessment.

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

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after about 2020. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.5% by 2020, rising to 20.3% by the mid-2030s.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises eg. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the September 2014 household survey.

14 The total turnover of shops within Rushmoor and Hart is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures. Plan A1.2 below shows the location of existing main food stores within Rushmoor and Hart.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Rushmoor and Hart and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. The total benchmark turnover of identified convenience sales floorspace within Rushmoor is £226.78 million and within Hart is £132.24 million (Tables 6A and 6B, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Population Assumptions

19 As set out above, the study area has been sub-divided into zones, using postcode sectors. Rushmoor Borough comprises Zones 1 and 2, while Hart District comprises the entirety of Zones 6 and 7, approximately 90% of Zone 8 and approximately 10% of Zone 4. Actual 2011 Census population data has been obtained for each of the zones from Experian.

20 For the baseline assessment, the latest ONS SNPP 2012 based projections have been applied. These figures are produced at a local authority level. The growth rates for each local authority have been applied to the corresponding proportion of population within each zone and projected forwards. Table A1.2 below summarises the population growth over the study period using the ONS population projections.

Table A1.2: Study Area Population (ONS Projections)

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,166	57,107	58,107	59,283	60,400	61,635
Zone 2 - Aldershot	37,843	38,529	39,174	39,860	40,667	41,434	42,281
Zone 3 - Guildford (Rural West)	34,670	35,874	37,079	38,077	39,253	40,307	41,200
Zone 4 - Farnham	38,678	39,335	40,417	41,541	42,794	43,892	44,842
Zone 5 - Camberley	39,951	40,368	41,017	41,759	42,593	43,427	44,261
Zone 6 - Fleet	31,789	32,488	33,151	33,815	34,514	35,108	35,667
Zone 7 - Yateley	33,518	34,255	34,954	35,654	36,391	37,017	37,606
Zone 8 - Hart (Rural West)	27,958	28,621	29,281	29,932	30,618	31,200	31,742
Zone 9 - Sandhurst	27,298	28,216	29,281	30,308	31,363	32,289	33,149
Total	**326,871**	**333,852**	**341,462**	**349,053**	**357,475**	**365,073**	**372,383**

Sources: Experian MMG3 2011 Census Population and SNPP 2012 based projections

21 As a separate sensitivity analysis, population projections from the Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment (SHMA) have been applied, in order to assess the implications for retail floorspace requirements if the objectively assessed housing needs are met in full.

22 The SHMA, prepared by Wessex Economics (December 2014), reviews a range of scenarios in terms of prospective employment growth in the Hart, Rushmoor and Surrey Heath housing market area (HMA).

23 The SHMA uses the 2011-based ONS projections as a starting point, which indicated a need for around 790 additional homes per annum in the HMA over the period from 2011 to 2031. However, Wessex Economics identified that migration assumptions used are too low and past population growth had been underestimated. As a result of this demographic modelling, the housing requirement has been adjusted to 925 homes per annum from 2011 to 2031.

24 Wessex Economics then assessed the prospective job growth in the HMA, and this analysis indicates a likely requirement for additional provision of homes over and above the demographically driven requirement, in order to ensure an adequate supply of labour to meet employer requirements.

25 The SHMA therefore concludes that the objectively assessed housing need for the HMA area is for 1,180 homes pa, which equates to 23,600 homes over the period 2011-31 (midpoint employment growth scenario). This level of planned provision allows for a significant uplift in employment growth above past trends, and would more than meet the demographically assessed housing requirement.

26 The SHMA identifies an objectively assessed housing need requirement of around 468 houses per annum in Rushmoor and 359 houses per annum in Hart. Over the 21-year period from 2011 to 2032 (assuming the same growth rate also applies after 2031), this equates to 9,822 additional houses in Rushmoor and 7,539 additional houses in Hart.

27 The SHMA provides detailed population projections associated with each growth scenario in Appendix F. The recommended projection scenario (PROJ 5 – midpoint employment growth) shows that the population of Rushmoor is estimated to increase by 19,159 over the period from 2011 to 2031 (Figure 14) or 958 per annum (Figure 13). For Hart, the population is estimated to increase by 15,912 between 2011 and 2031 (Figure 10) or 796 per annum (Figure 9). For the purposes of this analysis, we have assumed that the same growth rates will apply after 2031.

28 For Rushmoor, approximately 60% of the Borough population in 2011 is located in Zone 1 (Farnborough) and 40% in Zone 2 (Aldershot). If the existing patterns continue, and applying the SHMA growth pro rata, this suggests that over the study period, around 5,900 new homes will be located in the Farnborough zone and around 3,900 new homes will be located in the Aldershot zone. Within this context, the Aldershot Urban Extension (AUE) is proposing 3,850 new homes within Zone 2.

29 For Hart, approximately 34% of the District population in 2011 is located in Zone 6 (Fleet), 35% in Zone 7 (Yateley), 27% in Zone 8 (Hart Rural West) and 4% in Zone 4 (Farnham). If the existing patterns continue, and applying the SHMA growth pro rata, this suggests that over the study period, around 2,600 of Hart's new homes will be located in the Fleet zone, around 2,700 will be located in the Yateley zone, around 2,100 will be located in the Hart Rural West zone and around 300 will be located in the Farnham zone. The preferred scenario for housing allocations within Hart include a new settlement in central Hart, potentially at Winchfield (Zone 8). This new settlement could contain between 1,800 and 2,400 new homes within the plan period.

30 Table A1.3 below summarises the population growth over the study period using the SHMA population projections, using the existing pro rata

distribution of population. For areas not within the SHMA HMA, we have continued to apply the ONS projections.

Table A1.3: Study Area Population (SHMA Projections)

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,891	59,191	61,491	64,366	67,241	70,116
Zone 2 - Aldershot	37,843	38,992	40,524	42,056	43,971	45,886	47,801
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,346	40,475	41,647	42,974	44,160	45,202
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	32,602	33,686	34,770	36,125	37,480	38,835
Zone 7 - Yateley	33,518	34,352	35,464	36,576	37,966	39,356	40,746
Zone 8 - Hart (Rural West)	27,958	28,713	29,708	30,693	31,901	33,088	34,263
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**336,190**	**348,321**	**360,175**	**374,576**	**388,503**	**402,010**

Sources: Experian MMG3 2011 Census Population, Hart, Rushmoor and Surrey Heath SHMA (Midpoint Employment Growth Scenario) and SNPP 2012 based projections for other LPA areas

31 For the study area as a whole, applying the SHMA figures to the zones in Hart, Rushmoor and Surrey Heath, the total population is forecast to increase from 326,871 in 2011 to 388,503 in 2032. The SHMA projects an additional increase of 23,430 people in the study area over the Plan period compared to the ONS projections.

32 Future population growth within the Rushmoor zones has been redistributed to take into account the AUE.

33 Future population growth within the Hart zones has been redistributed to take into account both the potential new settlement in central Hart and the constraints on growth for the areas of the District affected by the Thames Basin Heaths Special Protection Area.

34 Tables A1.4 and A1.5 summarises the redistribution of SHMA population growth within the Rushmoor and Hart zones.

Table A1.4:Redistribution of Population Growth (Rushmoor)

Rushmoor	Proportion of Existing Rushmoor Population (%)	New Housing 2011-2032 Existing Distribution (no. of houses)	New Population 2011-2032 Existing Distribution (no. of people)	Redistribution of Population Growth (%)	Redistributed Housing Growth 2011-2032 (no. of houses)	New Population 2011-2032 Redistribution (no. of people)
Zone 1 - Farnborough	60.0%	5,893	12,071	36.6%	3,599	7,372
Zone 2 - Aldershot	40.0%	3,929	8,047	63.4%	6,223	12,746
Total	**100.0%**	**9,822**	**20,118**	**100.0%**	**9,822**	**20,118**

Table A1.5:Redistribution of Population Growth (Hart)

Hart	Proportion of Existing Hart Population (%)	New Housing 2011-2032 Existing Distribution (no. of houses)	New Population 2011-2032 Existing Distribution (no. of people)	Redistribution of Population Growth 2011-2019 (%)	Redistributed Housing Growth 2011-2019 (no. of houses)	New Population 2011-2019 Redistribution (no. of people)
Zone 4 - Farnham	4.0%	302	669	1.0%	39	86
Zone 6 - Fleet	34.0%	2,563	5,683	50.0%	1,940	4,300
Zone 7 - Yateley	35.0%	2,639	5,851	9.0%	349	774
Zone 8 - Hart (Rural West)	27.0%	2,036	4,513	40.0%	1,552	3,440
Total	**100.0%**	**7,539**	**16,716**	**100.0%**	**3,879**	**8,601**

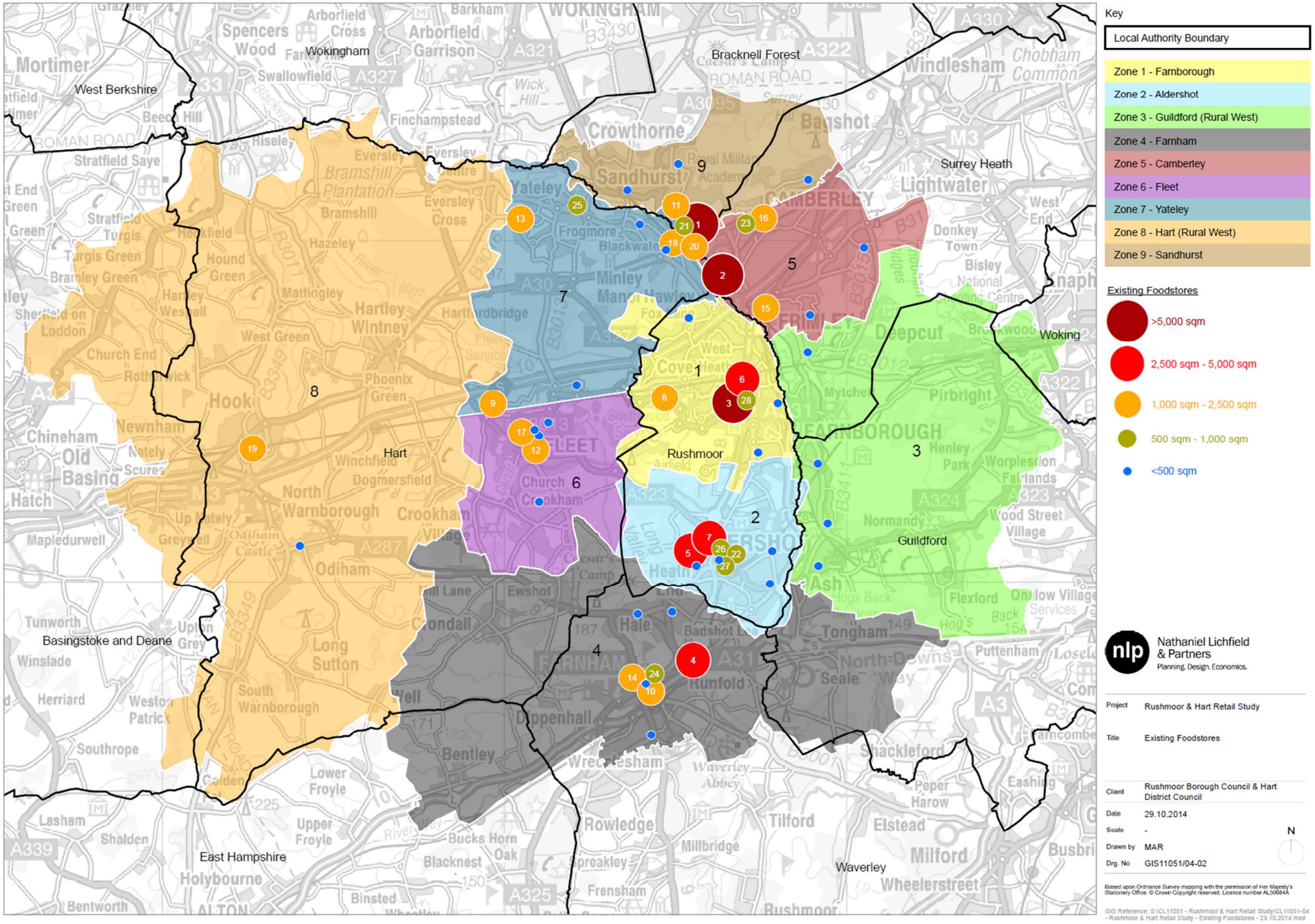
Hart	Redistribution of Population Growth 2019-2032 (%)	Redistributed Housing Growth 2019-2032 (no. of houses)	New Population 2019-2032 Redistribution (no. of people)
Zone 4 - Farnham	5.0%	183	406
Zone 6 - Fleet	25.0%	915	2,029
Zone 7 - Yateley	10.0%	366	812
Zone 8 - Hart (Rural West)	60.0%	2,196	4,869
Total	**100.0%**	**3,660**	**8,115**

35 Table A1.6 below summarises the population growth over the study period using the SHMA population projections, with the adjusted redistribution of population growth within the different zones.

Table A1.6: Study Area Population (Redistributed SHMA Projections)

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,219	57,623	59,027	60,782	62,537	64,292
Zone 2 - Aldershot	37,843	39,664	42,092	44,520	47,555	50,590	53,625
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,283	40,328	41,476	42,798	43,979	45,061
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	33,400	35,548	36,553	37,333	38,113	39,108
Zone 7 - Yateley	33,518	33,809	34,197	34,480	34,790	35,100	35,500
Zone 8 - Hart (Rural West)	27,958	29,358	31,213	32,893	34,901	36,888	39,373
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**337,027**	**350,274**	**361,891**	**375,432**	**388,499**	**402,006**

Plan A1.2: Location of Existing Food Store Provision



Key to Plan A1.2:

Ref	FASCIA	STREET	SUBURB	TOWN	POSTCODE	NET SQ.M
1	TESCO EXTRA	MARSHALL ROAD	COLLEGE TOWN	SANDHURST	GU47 0FD	8,297
2	SAINSBURYS	BLACKWATER VALLEY ROAD		CAMBERLEY	GU15 3YN	6,915
3	ASDA	WESTMEAD		FARNBOROUGH	GU14 7LT	5,242
4	SAINSBURYS	WATER LANE		FARNHAM	GU 9 9NJ	4,354
5	TESCO	WELLINGTON AVENUE		ALDERSHOT	GU11 1SQ	4,003
6	SAINSBURYS	QUEENSMEAD		FARNBOROUGH	GU14 7GL	3,171
7	MORRISONS	ALEXANDRA ROAD		ALDERSHOT	GU11 1WF	3,099
8	MORRISONS	LINKS WAY		FARNBOROUGH	GU14 0NA	2,274
9	MORRISONS	ELVETHAM HEATH		FLEET	GU51 1HA	2,066
10	SAINSBURYS	SOUTH STREET		FARNHAM	GU 9 7RP	1,943
11	WAITROSE	YORKTOWN ROAD	COLLEGE TOWN	SANDHURST	GU47 0PU	1,746
12	WAITROSE			FLEET	GU51 3LA	1,694
13	WAITROSE	TRESHAM CRESCENT		YATELEY	GU46 6FR	1,684
14	WAITROSE	THE HART		FARNHAM	GU 9 7HD	1,617
15	WAITROSE	FRIMLEY HIGH STREET	FRIMLEY	CAMBERLEY	GU16 7JD	1,464
16	SAINSBURYS	CAMBRIDGE WALK		CAMBERLEY	GU15 3SW	1,293
17	SAINSBURYS	FLEET ROAD		FLEET	GU51 4BE	1,211
18	ALDI	LONDON ROAD	BLACKWATER	CAMBERLEY	GU17 0AA	1,115
19	TESCO	STATION ROAD		HOOK	RG27 9JE	1,110
20	LIDL	LONDON ROAD		CAMBERLEY	GU17 9AP	1,008
21	M&S FOODHALL	MARSHALL ROAD	COLLEGE TOWN	SANDHURST	GU47 0FD	977
22	LIDL	WELLINGTON STREET		ALDERSHOT	GU11 1DB	974
23	LIDL	CHARLES STREET		CAMBERLEY	GU15 3GP	890
24	LIDL	DOGFLUD WAY		FARNHAM	GU 9 7SW	889
25	CO OP - FOODSTORE	PLOUGH ROAD		YATELEY	GU46 7UW	842
26	M&S FOODHALL	UNION STREET		ALDERSHOT	GU11 1BT	786
27	CO OP - FOODSTORE	VICTORIA ROAD		ALDERSHOT	GU11 1JE	666
28	ICELAND	QUEENSMEAD		FARNBOROUGH	GU14 7SH	565
	ICELAND	EAST STREET		FARNHAM	GU 9 7TX	452
	ICELAND	FLEET ROAD		FLEET	GU51 3BL	447
	SAINSBURYS LOCAL	HEATHER RIDGE ARCADE		CAMBERLEY	GU15 1AX	442
	ICELAND	VICTORIA ROAD		ALDERSHOT	GU11 1JR	432
	CO OP - FOODSTORE	FARNBOROUGH ROAD		FARNHAM	GU 9 9AJ	410
	BUDGENS	WHARF ROAD	ASH VALE	ALDERSHOT	GU12 5AS	343
	CO OP - FOODSTORE	FERNHILL ROAD		FARNBOROUGH	GU14 9EF	260
	TESCO EXPRESS	LYSONS AVENUE	ASH VALE	ALDERSHOT	GU12 5QL	255
	CO OP - FOODSTORE	QUEENS ROAD		FARNBOROUGH	GU14 6DJ	224
	CO OP - FOODSTORE	KINGS ROAD		FLEET	GU51 3ST	202
	M LOCAL	WHARF ROAD	FRIMLEY GREEN	CAMBERLEY	GU16 6LE	201
	TESCO EXPRESS	FALKNERS CLOSE	ANCELLS FARM	FLEET	GU51 2XF	197
	M&S SIMPLY FOOD	FLEET ROAD		FLEET	GU51 4BE	190
	CO OP - FOODSTORE	WOBURN AVENUE		FARNBOROUGH	GU14 7EF	183
	TESCO EXPRESS	UPPER HALE ROAD		FARNHAM	GU 9 0JH	173
	CO OP - FOODSTORE	UPPER COLLEGE RIDE		CAMBERLEY	GU15 4HE	171
	CO OP - FOODSTORE	ASH STREET	ASH	ALDERSHOT	GU12 6LG	171
	TESCO EXPRESS	LONDON ROAD	BLACKWATER	CAMBERLEY	GU17 0AE	157
	CO OP - FOODSTORE	HIGH STREET	ODIHAM	HOOK	RG29 1LA	155
	CO OP - FOODSTORE	YORKTOWN ROAD		SANDHURST	GU47 9DU	143
	CO OP - FOODSTORE	NORTH LANE		ALDERSHOT	GU12 4SY	143
	TESCO EXPRESS	ROSEMARY LANE	BLACKWATER	CAMBERLEY	GU17 0LL	141
	TESCO EXPRESS	BALMORAL DRIVE	FRIMLEY	CAMBERLEY	GU16 8UR	130
	CO OP - FOODSTORE	QUEENS ROAD		ALDERSHOT	GU11 3LA	126
	CO OP - FOODSTORE	YEOVIL ROAD	OWLSMOOR	SANDHURST	GU47 0TF	121
	TESCO EXPRESS	RIDGWAY ROAD		FARNHAM	GU 9 8NN	120
	CO OP - FOODSTORE	ASH ROAD		ALDERSHOT	GU12 4ES	106
	CO OP - FOODSTORE	RIDGEWAY PARADE	CHURCH CROOKHAM	FLEET	GU52 6NY	90

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,166	57,107	58,107	59,283	60,400	61,635
Zone 2 - Aldershot	37,843	38,529	39,174	39,860	40,667	41,434	42,281
Zone 3 - Guildford (Rural West)	34,670	35,874	37,079	38,077	39,253	40,307	41,200
Zone 4 - Farnham	38,678	39,335	40,417	41,541	42,794	43,892	44,842
Zone 5 - Camberley	39,951	40,368	41,017	41,759	42,593	43,427	44,261
Zone 6 - Fleet	31,789	32,488	33,151	33,815	34,514	35,108	35,667
Zone 7 - Yateley	33,518	34,255	34,954	35,654	36,391	37,017	37,606
Zone 8 - Hart (Rural West)	27,958	28,621	29,281	29,932	30,618	31,200	31,742
Zone 9 - Sandhurst	27,298	28,216	29,281	30,308	31,363	32,289	33,149
Total	**326,871**	**333,852**	**341,462**	**349,053**	**357,475**	**365,073**	**372,383**

Source: Experian MMG3 2011 Census Population and SNPP 2012 based projections

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	1,912	1,933	1,959	2,008	2,056	2,109
Zone 2 - Aldershot	1,774	1,792	1,817	1,862	1,907	1,956
Zone 3 - Guildford (Rural West)	2,025	2,046	2,074	2,126	2,176	2,233
Zone 4 - Farnham	2,254	2,278	2,309	2,367	2,423	2,486
Zone 5 - Camberley	2,217	2,241	2,272	2,328	2,384	2,446
Zone 6 - Fleet	2,237	2,261	2,291	2,349	2,405	2,467
Zone 7 - Yateley	2,102	2,124	2,153	2,207	2,260	2,318
Zone 8 - Hart (Rural West)	2,257	2,281	2,312	2,370	2,426	2,490
Zone 9 - Sandhurst	2,065	2,087	2,116	2,168	2,220	2,278

Sources:
Experian Local Expenditure 2013 (2013 prices)
Growth Rates: -0.5% 2013-2014, 0.5% 2014-2015, 0.4% 2015-2016 and 0.6% p.a. from 2016
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	107.39	110.36	113.82	119.02	124.16	129.99
Zone 2 - Aldershot	68.33	70.22	72.42	75.73	79.00	82.71
Zone 3 - Guildford (Rural West)	72.63	75.87	78.97	83.44	87.72	92.00
Zone 4 - Farnham	88.67	92.08	95.93	101.29	106.36	111.49
Zone 5 - Camberley	89.51	91.92	94.86	99.17	103.52	108.25
Zone 6 - Fleet	72.67	74.94	77.48	81.06	84.42	87.99
Zone 7 - Yateley	72.00	74.26	76.78	80.32	83.65	87.19
Zone 8 - Hart (Rural West)	64.60	66.80	69.21	72.56	75.70	79.02
Zone 9 - Sandhurst	58.27	61.12	64.12	68.01	71.69	75.51
Total	**694.08**	**717.57**	**743.58**	**780.59**	**816.22**	**854.15**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	% Inflow
Asda, Farnborough	23.1%	4.4%	9.9%	1.6%	6.2%	5.1%	1.3%	0.3%	2.5%	10.0%
Morrisons, Farnborough	13.5%	0.5%	0.5%	0.1%	0.6%	0.0%	2.9%	0.0%	0.3%	10.0%
Sainsbury's, Farnborough	17.0%	0.2%	4.4%	0.0%	1.6%	0.8%	0.8%	0.2%	0.0%	10.0%
Other, Farnborough	9.4%	0.3%	2.1%	0.6%	0.7%	0.2%	2.1%	0.2%	2.1%	10.0%
Tesco, Aldershot	5.0%	32.8%	9.6%	8.3%	0.1%	5.0%	1.0%	0.0%	0.0%	10.0%
Morrisons, Aldershot	1.3%	18.0%	4.0%	3.7%	2.1%	3.0%	0.2%	0.0%	0.0%	10.0%
Other, Aldershot	0.5%	24.4%	2.1%	2.1%	1.0%	0.6%	0.3%	0.0%	0.0%	10.0%
North Camp	1.5%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	5.0%
Other Rushmoor Borough	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Rushmoor Borough Sub Total	**71.3%**	**80.7%**	**32.6%**	**16.4%**	**12.6%**	**14.8%**	**8.6%**	**0.7%**	**4.9%**	
Aldi, Blackwater	4.6%	0.0%	3.2%	0.0%	3.8%	0.1%	13.2%	3.2%	5.9%	5.0%
Other, Blackwater	1.6%	0.0%	0.4%	0.2%	4.5%	0.5%	7.9%	1.0%	7.7%	5.0%
Morrisons, Fleet	0.0%	0.0%	0.0%	0.3%	0.5%	20.1%	9.4%	9.1%	0.0%	5.0%
Sainsbury's, Fleet	0.0%	0.0%	0.0%	0.6%	0.0%	20.6%	3.0%	1.7%	0.0%	5.0%
Waitrose, Fleet	2.0%	0.3%	0.5%	1.4%	0.0%	15.5%	2.2%	4.1%	0.0%	5.0%
Other, Fleet	0.8%	1.7%	1.0%	1.7%	0.1%	15.7%	3.1%	2.4%	0.0%	5.0%
Tesco, Hook	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	36.7%	0.0%	5.0%
Other, Hook	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	5.0%
Waitrose, Yateley	0.2%	0.0%	0.0%	0.0%	0.5%	0.5%	9.0%	9.4%	0.0%	5.0%
Other, Yateley	0.3%	0.0%	0.0%	0.2%	0.0%	0.0%	7.4%	0.4%	0.9%	5.0%
Hartley Wintney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	5.0%
Odiham	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	3.0%	0.0%	5.0%
Other Hart District	0.0%	0.0%	0.0%	1.2%	0.0%	1.5%	0.0%	0.0%	0.0%	5.0%
Hart District Sub Total	**9.5%**	**2.0%**	**5.1%**	**6.1%**	**9.4%**	**74.7%**	**55.2%**	**76.0%**	**14.5%**	
Food Stores in Basingstoke	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	13.2%	0.0%	n/a
Food Stores in Camberley	6.4%	0.2%	9.6%	0.0%	34.7%	0.9%	8.3%	1.8%	17.5%	n/a
Food Stores in Farnham	1.0%	13.3%	5.7%	67.7%	0.9%	1.1%	1.4%	1.1%	0.0%	n/a
Food Stores in The Meadows	6.8%	0.7%	3.3%	1.3%	17.3%	1.1%	22.9%	3.6%	35.1%	n/a
Food Stores in Woking	0.2%	0.0%	13.4%	0.6%	2.3%	0.0%	0.0%	0.0%	0.3%	n/a
Other	4.7%	3.1%	30.3%	7.9%	22.8%	7.1%	3.6%	3.6%	27.7%	n/a
Other Sub-Total	**19.2%**	**17.3%**	**62.3%**	**77.5%**	**78.0%**	**10.5%**	**36.2%**	**23.3%**	**80.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2014	**107.39**	**68.33**	**72.63**	**88.67**	**89.51**	**72.67**	**72.00**	**64.60**	**58.27**		**694.08**
Asda, Farnborough	24.81	3.01	7.19	1.42	5.55	3.71	0.94	0.19	1.46	5.36	53.63
Morrisons, Farnborough	14.50	0.34	0.36	0.09	0.54	0.00	2.09	0.00	0.17	2.01	20.10
Sainsbury's, Farnborough	18.26	0.14	3.20	0.00	1.43	0.58	0.58	0.13	0.00	2.70	27.01
Other, Farnborough	10.10	0.20	1.53	0.53	0.63	0.15	1.51	0.13	1.22	1.78	17.77
Tesco, Aldershot	5.37	22.41	6.97	7.36	0.09	3.63	0.72	0.00	0.00	5.17	51.73
Morrisons, Aldershot	1.40	12.30	2.91	3.28	1.88	2.18	0.14	0.00	0.00	2.68	26.76
Other, Aldershot	0.54	16.67	1.53	1.86	0.90	0.44	0.22	0.00	0.00	2.46	24.60
North Camp	1.61	0.00	0.00	0.00	0.27	0.07	0.00	0.00	0.00	0.10	2.05
Other Rushmoor Borough	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07
Rushmoor Borough Sub Total	**76.57**	**55.14**	**23.68**	**14.54**	**11.28**	**10.75**	**6.19**	**0.45**	**2.86**	**22.27**	**223.73**
Aldi, Blackwater	4.94	0.00	2.32	0.00	3.40	0.07	9.50	2.07	3.44	1.36	27.10
Other, Blackwater	1.72	0.00	0.29	0.18	4.03	0.36	5.69	0.65	4.49	0.92	18.31
Morrisons, Fleet	0.00	0.00	0.00	0.27	0.45	14.61	6.77	5.88	0.00	1.47	29.44
Sainsbury's, Fleet	0.00	0.00	0.00	0.53	0.00	14.97	2.16	1.10	0.00	0.99	19.75
Waitrose, Fleet	2.15	0.20	0.36	1.24	0.00	11.26	1.58	2.65	0.00	1.02	20.48
Other, Fleet	0.86	1.16	0.73	1.51	0.09	11.41	2.23	1.55	0.00	1.03	20.56
Tesco, Hook	0.00	0.00	0.00	0.44	0.00	0.00	0.00	23.71	0.00	1.27	25.42
Other, Hook	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.97	0.00	0.05	1.02
Waitrose, Yateley	0.21	0.00	0.00	0.00	0.45	0.36	6.48	6.07	0.00	0.71	14.29
Other, Yateley	0.32	0.00	0.00	0.18	0.00	0.00	5.33	0.26	0.52	0.35	6.96
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.26	0.00	0.12	2.38
Odiham	0.00	0.00	0.00	0.00	0.00	0.15	0.00	1.94	0.00	0.11	2.19
Other Hart District	0.00	0.00	0.00	1.06	0.00	1.09	0.00	0.00	0.00	0.11	2.27
Hart District Sub Total	**10.20**	**1.37**	**3.70**	**5.41**	**8.41**	**54.28**	**39.75**	**49.10**	**8.45**	**9.51**	**190.18**
Food Stores in Basingstoke	0.11	0.00	0.00	0.00	0.00	0.22	0.00	8.53	0.00	n/a	8.85
Food Stores in Camberley	6.87	0.14	6.97	0.00	31.06	0.65	5.98	1.16	10.20	n/a	63.03
Food Stores in Farnham	1.07	9.09	4.14	60.03	0.81	0.80	1.01	0.71	0.00	n/a	77.65
Food Stores in The Meadows	7.30	0.48	2.40	1.15	15.49	0.80	16.49	2.33	20.45	n/a	66.88
Food Stores in Woking	0.21	0.00	9.73	0.53	2.06	0.00	0.00	0.00	0.17	n/a	12.71
Other	5.05	2.12	22.01	7.00	20.41	5.16	2.59	2.33	16.14	n/a	82.80
Other Sub-Total	**20.62**	**11.82**	**45.25**	**68.72**	**69.82**	**7.63**	**26.07**	**15.05**	**46.97**		**311.94**
TOTAL	**107.39**	**68.33**	**72.63**	**88.67**	**89.51**	**72.67**	**72.00**	**64.60**	**58.27**		**725.85**

Source: Tables 3 and 4

Table 6A: Rushmoor Convenience Goods Floorspace 2014 and Commitments

Centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Farnborough	Asda, Westmead	5,242	65%	3,407	£13,972	£47.61
	Sainsbury's Queensmead	3,171	75%	2,378	£14,182	£33.73
	Iceland, Queensmead	565	95%	537	£7,596	£4.08
	Other convenience shops, Farnborough Town Centre	567	100%	567	£5,000	£2.84
	Morrison's, Links Way	2,274	85%	1,933	£13,171	£25.46
	Co-op, Fernhill Road	260	95%	247	£7,977	£1.97
	Co-op, Woburn Avenue	183	95%	174	£7,977	£1.39
	Sub-Total	**12,262**		**9,243**		**£117.06**
North Camp	Co-op, Queens Road	225	95%	214	£7,977	£1.71
	Other convenience shops, North Camp	500	100%	500	£5,000	£2.50
	Sub-Total	**725**		**714**		**£4.21**
Aldershot	Morrison's, Alexandra Road	3,099	85%	2,634	£13,171	£34.69
	Tesco, Wellington Avenue	4,003	80%	3,202	£11,538	£36.95
	Marks & Spencer Food Hall	786	95%	747	£11,718	£8.75
	Co-op, Victoria Road	666	90%	599	£7,977	£4.78
	Iceland, Victoria Road	432	95%	410	£7,596	£3.12
	Lidl, Wellington Street	974	95%	925	£3,268	£3.02
	Other convenience shops, Aldershot Town Centre	1,925	100%	1,925	£5,000	£9.63
	Co-op, Queens Road	126	95%	120	£7,977	£0.95
	Co-op, North Lane	143	95%	136	£7,977	£1.08
	Co-op, Ash Road	106	95%	101	£7,977	£0.80
	Sainsbury's Local, Ash Road	128	95%	122	£14,182	£1.72
	Sub-Total	**12,388**		**10,921**		**£105.51**
	Rushmoor Total	**25,375**		**20,878**		**£226.78**
Retail Commitments		**Sales Floorspace (sq.m net)**	**Convenience Goods Floorspace (%)**	**Convenience Goods Floorspace (sq.m net)**	**Turnover (£ per sq.m)**	**Total Turnover (£m)**
Aldershot Urban Extension	Floorspace within new local centre	1,110	100%	1,110	£10,000	£11.10

Source: Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 6B: Hart Convenience Goods Floorspace 2014 and Commitments

Centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Blackwater	Aldi, London Road	1,115	90%	1,004	£8,451	£8.48
	Tesco Express, London Road	157	90%	141	£11,538	£1.63
	Tesco Express, Rosemary Lane	141	95%	134	£11,538	£1.55
	Lidl, London Road	1,008	90%	907	£3,268	£2.96
	Other convenience shops, Blackwater	95	100%	95	£5,000	£0.48
	Sub-Total	**2,516**		**2,281**		**£15.10**
Fleet	Sainsbury's, Fleet Road	1,211	90%	1,090	£14,182	£15.46
	Waitrose, Hart Centre	1,694	90%	1,525	£12,355	£18.84
	Marks & Spencer Simply Food, Fleet Road	190	95%	181	£11,718	£2.12
	Iceland, Fleet Road	447	95%	425	£7,596	£3.23
	Other convenience shops, Fleet Town Centre	637	100%	637	£5,000	£3.19
	Morrison's, Elvetham Heath	2,066	85%	1,756	£13,171	£23.13
	Co-op, Kings Road	202	95%	192	£7,977	£1.53
	Co-op, Church Crookham	90	95%	86	£7,977	£0.68
	Tesco Express, Ancells Farm	197	95%	187	£11,538	£2.16
	Sub-Total	**6,734**		**6,077**		**£70.32**
Hook	Tesco, Station Road	1,110	90%	999	£11,538	£11.53
	Other convenience shops, Hook	413	100%	413	£5,000	£2.07
	Sub-Total	**1,523**		**1,412**		**£13.59**
Odiham	Co-op, High Street	155	95%	147	£7,977	£1.17
	Other convenience shops, Odiham	177	100%	177	£5,000	£0.89
	Sub-Total	**332**		**324**		**£2.06**
Yateley	Waitrose, Tresham Crescent	1,684	90%	1,516	£12,355	£18.73
	Co-op, Plough Road	842	90%	758	£7,977	£6.04
	Other convenience shops, Yateley	686	100%	686	£5,000	£3.43
	Sub-Total	**3,212**		**2,959**		**£28.20**
Hartley Wintney	Convenience shops	595	100%	595	£5,000	£2.98
	Hart Total	**14,912**		**13,649**		**£132.24**
Retail Commitments		**Sales Floorspace (sq.m net)**	**Convenience Goods Floorspace (%)**	**Convenience Goods Floorspace (sq.m net)**	**Turnover (£ per sq.m)**	**Total Turnover (£m)**
Hook	Sainsbury's, London Road	3,055	91%	2,792	£14,182	£39.60

Source: Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 7: Adjusted Convenience Goods Market Shares (%)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	% Inflow
Farnborough	62.1%	5.0%	16.4%	2.2%	8.9%	5.8%	6.7%	0.7%	4.9%	10.0%
Aldershot	7.8%	75.9%	16.7%	14.4%	3.8%	9.7%	2.2%	0.0%	0.0%	10.0%
North Camp	1.5%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	5.0%
Other Rushmoor Borough	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Rushmoor Borough Sub Total	**71.4%**	**81.0%**	**33.1%**	**16.6%**	**13.0%**	**15.6%**	**8.9%**	**0.7%**	**4.9%**	
Blackwater	6.2%	0.0%	3.6%	0.2%	8.3%	0.6%	20.0%	3.9%	13.6%	5.0%
Fleet	2.8%	1.9%	1.5%	3.5%	0.6%	64.5%	15.0%	13.4%	0.0%	5.0%
Hook	0.0%	0.0%	0.0%	4.4%	0.0%	7.4%	7.3%	48.8%	0.0%	10.0%
Yateley	0.5%	0.0%	0.0%	0.2%	0.5%	0.5%	14.8%	8.3%	0.9%	5.0%
Hartley Wintney	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	5.0%
Odiham	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	2.6%	0.0%	5.0%
Other Hart District	0.0%	0.0%	0.0%	1.2%	0.0%	1.4%	0.0%	0.0%	0.0%	5.0%
Hart District Sub Total	**9.5%**	**1.9%**	**5.1%**	**9.5%**	**9.4%**	**74.6%**	**57.1%**	**80.2%**	**14.5%**	
Food Stores in Basingstoke	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	10.3%	0.0%	n/a
Food Stores in Camberley	6.4%	0.2%	9.5%	0.0%	34.5%	0.9%	7.9%	1.7%	17.5%	n/a
Food Stores in Farnham	1.0%	13.1%	5.6%	65.0%	0.9%	1.1%	1.3%	1.0%	0.0%	n/a
Food Stores in The Meadows	6.8%	0.7%	3.3%	1.2%	17.2%	1.1%	21.7%	3.3%	35.1%	n/a
Food Stores in Woking	0.2%	0.0%	13.3%	0.6%	2.3%	0.0%	0.0%	0.0%	0.3%	n/a
Other	4.6%	3.1%	30.1%	7.1%	22.7%	6.4%	3.1%	2.8%	27.7%	n/a
Other Sub-Total	**19.1%**	**17.1%**	**61.8%**	**73.9%**	**77.6%**	**9.8%**	**34.0%**	**19.1%**	**80.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2014 with NLP adjustments

Note: Adjusted shares applied to Hart from 2018, and to Rushmoor from 2019 to take account of likely timing of commitments

Table 8: Convenience Goods Expenditure 2018 (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2018	**110.36**	**70.22**	**75.87**	**92.08**	**91.92**	**74.94**	**74.26**	**66.80**	**61.12**		**717.57**
Farnborough	69.53	3.79	12.82	2.12	8.36	4.57	5.27	0.47	2.99	12.21	122.14
Aldershot	7.50	52.80	11.91	12.98	2.94	6.45	1.11	0.00	0.00	10.63	106.34
North Camp	1.66	0.00	0.00	0.00	0.28	0.07	0.00	0.00	0.00	0.11	2.11
Other Rushmoor Borough	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07
Rushmoor Borough Sub Total	**78.69**	**56.67**	**24.73**	**15.10**	**11.58**	**11.09**	**6.39**	**0.47**	**2.99**	**22.96**	**230.67**
Blackwater	6.84	0.00	2.73	0.18	7.63	0.45	14.85	2.61	8.31	2.30	45.90
Fleet	3.09	1.33	1.14	3.22	0.55	48.34	11.14	8.95	0.00	4.09	81.86
Hook	0.00	0.00	0.00	4.05	0.00	5.55	5.42	32.60	0.00	5.29	52.91
Yateley	0.55	0.00	0.00	0.18	0.46	0.37	10.99	5.54	0.55	0.98	19.64
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.14	0.00	0.11	2.25
Odiham	0.00	0.00	0.00	0.00	0.00	0.15	0.00	1.74	0.00	0.10	1.99
Other Hart District	0.00	0.00	0.00	1.10	0.00	1.12	0.00	0.00	0.00	0.12	2.35
Hart District Sub Total	**10.48**	**1.33**	**3.87**	**8.75**	**8.64**	**55.98**	**42.40**	**53.57**	**8.86**	**12.99**	**206.88**
Food Stores in Basingstoke	0.11	0.00	0.00	0.00	0.00	0.22	0.00	6.88	0.00	n/a	7.22
Food Stores in Camberley	7.06	0.14	7.28	0.00	31.90	0.67	5.87	1.14	10.70	n/a	64.76
Food Stores in Farnham	1.10	9.34	4.32	60.04	0.83	0.82	0.97	0.67	0.00	n/a	78.09
Food Stores in The Meadows	7.50	0.49	2.50	1.10	15.90	0.82	16.11	2.20	21.45	n/a	68.10
Food Stores in Woking	0.22	0.00	10.17	0.55	2.11	0.00	0.00	0.00	0.18	n/a	13.24
Other	5.19	2.25	22.99	6.54	20.96	5.32	2.52	1.87	16.93	n/a	84.56
Other Sub-Total	**21.19**	**12.22**	**47.27**	**68.23**	**71.70**	**7.87**	**25.47**	**12.76**	**49.26**		**315.96**
TOTAL	**110.36**	**70.22**	**75.87**	**92.08**	**91.92**	**74.94**	**74.26**	**66.80**	**61.12**		**753.51**

Source: Tables 3 and 7

Table 9: Convenience Goods Expenditure 2022 (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2022	**113.82**	**72.42**	**78.97**	**95.93**	**94.86**	**77.48**	**76.78**	**69.21**	**64.12**		**743.58**
Farnborough	70.68	3.62	12.95	2.11	8.44	4.49	5.14	0.48	3.14	12.34	123.41
Aldershot	8.88	54.97	13.19	13.81	3.60	7.52	1.69	0.00	0.00	11.52	115.17
North Camp	1.71	0.00	0.00	0.00	0.28	0.08	0.00	0.00	0.00	0.11	2.18
Other Rushmoor Borough	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
Rushmoor Borough Sub Total	**81.27**	**58.66**	**26.14**	**15.92**	**12.33**	**12.09**	**6.83**	**0.48**	**3.14**	**23.97**	**240.84**
Blackwater	7.06	0.00	2.84	0.19	7.87	0.46	15.36	2.70	8.72	2.38	47.58
Fleet	3.19	1.38	1.18	3.36	0.57	49.98	11.52	9.27	0.00	4.23	84.67
Hook	0.00	0.00	0.00	4.22	0.00	5.73	5.60	33.77	0.00	5.48	54.81
Yateley	0.57	0.00	0.00	0.19	0.47	0.39	11.36	5.74	0.58	1.02	20.32
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.21	0.00	0.12	2.33
Odiham	0.00	0.00	0.00	0.00	0.00	0.15	0.00	1.80	0.00	0.10	2.06
Other Hart District	0.00	0.00	0.00	1.15	0.00	1.08	0.00	0.00	0.00	0.12	2.35
Hart District Sub Total	**10.81**	**1.38**	**4.03**	**9.11**	**8.92**	**57.80**	**43.84**	**55.51**	**9.30**	**13.45**	**214.14**
Food Stores in Basingstoke	0.11	0.00	0.00	0.00	0.00	0.23	0.00	7.13	0.00	n/a	7.47
Food Stores in Camberley	7.28	0.14	7.50	0.00	32.72	0.70	6.07	1.18	11.22	n/a	66.82
Food Stores in Farnham	1.14	9.49	4.42	62.35	0.85	0.85	1.00	0.69	0.00	n/a	80.80
Food Stores in The Meadows	7.74	0.51	2.61	1.15	16.32	0.85	16.66	2.28	22.51	n/a	70.62
Food Stores in Woking	0.23	0.00	10.50	0.58	2.18	0.00	0.00	0.00	0.19	n/a	13.68
Other	5.24	2.24	23.77	6.81	21.53	4.96	2.38	1.94	17.76	n/a	86.63
Other Sub-Total	**21.74**	**12.38**	**48.80**	**70.89**	**73.61**	**7.59**	**26.10**	**13.22**	**51.68**		**326.02**
TOTAL	**113.82**	**72.42**	**78.97**	**95.93**	**94.86**	**77.48**	**76.78**	**69.21**	**64.12**		**781.00**

Source: Tables 3 and 7

Table 10: Convenience Goods Expenditure 2027 (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2027	**119.02**	**75.73**	**83.44**	**101.29**	**99.17**	**81.06**	**80.32**	**72.56**	**68.01**		**780.59**
Farnborough	73.91	3.79	13.68	2.23	8.83	4.70	5.38	0.51	3.33	12.93	129.29
Aldershot	9.28	57.48	13.93	14.59	3.77	7.86	1.77	0.00	0.00	12.08	120.76
North Camp	1.79	0.00	0.00	0.00	0.30	0.08	0.00	0.00	0.00	0.11	2.28
Other Rushmoor Borough	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
Rushmoor Borough Sub Total	**84.98**	**61.34**	**27.62**	**16.81**	**12.89**	**12.65**	**7.15**	**0.51**	**3.33**	**25.12**	**252.40**
Blackwater	7.38	0.00	3.00	0.20	8.23	0.49	16.06	2.83	9.25	2.50	49.94
Fleet	3.33	1.44	1.25	3.55	0.59	52.28	12.05	9.72	0.00	4.43	88.65
Hook	0.00	0.00	0.00	4.46	0.00	6.00	5.86	35.41	0.00	5.75	57.48
Yateley	0.60	0.00	0.00	0.20	0.50	0.41	11.89	6.02	0.61	1.06	21.29
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.32	0.00	0.12	2.44
Odiham	0.00	0.00	0.00	0.00	0.00	0.16	0.00	1.89	0.00	0.11	2.16
Other Hart District	0.00	0.00	0.00	1.22	0.00	1.13	0.00	0.00	0.00	0.12	2.47
Hart District Sub Total	**11.31**	**1.44**	**4.26**	**9.62**	**9.32**	**60.47**	**45.86**	**58.20**	**9.86**	**14.10**	**224.43**
Food Stores in Basingstoke	0.12	0.00	0.00	0.00	0.00	0.24	0.00	7.47	0.00	n/a	7.84
Food Stores in Camberley	7.62	0.15	7.93	0.00	34.21	0.73	6.35	1.23	11.90	n/a	70.12
Food Stores in Farnham	1.19	9.92	4.67	65.84	0.89	0.89	1.04	0.73	0.00	n/a	85.17
Food Stores in The Meadows	8.09	0.53	2.75	1.22	17.06	0.89	17.43	2.39	23.87	n/a	74.24
Food Stores in Woking	0.24	0.00	11.10	0.61	2.28	0.00	0.00	0.00	0.20	n/a	14.43
Other	5.47	2.35	25.12	7.19	22.51	5.19	2.49	2.03	18.84	n/a	91.19
Other Sub-Total	**22.73**	**12.95**	**51.57**	**74.85**	**76.95**	**7.94**	**27.31**	**13.86**	**54.82**		**342.98**
TOTAL	**119.02**	**75.73**	**83.44**	**101.29**	**99.17**	**81.06**	**80.32**	**72.56**	**68.01**		**819.81**

Source: Tables 3 and 7

Table 11: Convenience Goods Expenditure 2032 (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2032	**124.16**	**79.00**	**87.72**	**106.36**	**103.52**	**84.42**	**83.65**	**75.70**	**71.69**		**816.22**
Farnborough	77.10	3.95	14.39	2.34	9.21	4.90	5.60	0.53	3.51	13.50	135.04
Aldershot	9.68	59.96	14.65	15.32	3.93	8.19	1.84	0.00	0.00	12.62	126.19
North Camp	1.86	0.00	0.00	0.00	0.31	0.08	0.00	0.00	0.00	0.12	2.38
Other Rushmoor Borough	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08
Rushmoor Borough Sub Total	**88.65**	**63.99**	**29.04**	**17.66**	**13.46**	**13.17**	**7.44**	**0.53**	**3.51**	**26.25**	**263.69**
Blackwater	7.70	0.00	3.16	0.21	8.59	0.51	16.73	2.95	9.75	2.61	52.21
Fleet	3.48	1.50	1.32	3.72	0.62	54.45	12.55	10.14	0.00	4.62	92.40
Hook	0.00	0.00	0.00	4.68	0.00	6.25	6.11	36.94	0.00	6.00	59.97
Yateley	0.62	0.00	0.00	0.21	0.52	0.42	12.38	6.28	0.65	1.11	22.19
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.42	0.00	0.13	2.55
Odiham	0.00	0.00	0.00	0.00	0.00	0.17	0.00	1.97	0.00	0.11	2.25
Other Hart District	0.00	0.00	0.00	1.28	0.00	1.18	0.00	0.00	0.00	0.13	2.59
Hart District Sub Total	**11.79**	**1.50**	**4.47**	**10.10**	**9.73**	**62.98**	**47.76**	**60.71**	**10.39**	**14.71**	**234.16**
Food Stores in Basingstoke	0.12	0.00	0.00	0.00	0.00	0.25	0.00	7.80	0.00	n/a	8.17
Food Stores in Camberley	7.95	0.16	8.33	0.00	35.71	0.76	6.61	1.29	12.55	n/a	73.35
Food Stores in Farnham	1.24	10.35	4.91	69.14	0.93	0.93	1.09	0.76	0.00	n/a	89.34
Food Stores in The Meadows	8.44	0.55	2.89	1.28	17.81	0.93	18.15	2.50	25.16	n/a	77.71
Food Stores in Woking	0.25	0.00	11.67	0.64	2.38	0.00	0.00	0.00	0.22	n/a	15.15
Other	5.71	2.45	26.41	7.55	23.50	5.40	2.59	2.12	19.86	n/a	95.59
Other Sub-Total	**23.71**	**13.51**	**54.21**	**78.60**	**80.33**	**8.27**	**28.44**	**14.46**	**57.78**		**359.32**
TOTAL	**124.16**	**79.00**	**87.72**	**106.36**	**103.52**	**84.42**	**83.65**	**75.70**	**71.69**		**857.17**

Source: Tables 3 and 7

Table 12: Convenience Goods Expenditure 2037 (£m)

Centre/Facility	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2037	**129.99**	**82.71**	**92.00**	**111.49**	**108.25**	**87.99**	**87.19**	**79.02**	**75.51**		**854.15**
Farnborough	80.72	4.14	15.09	2.45	9.63	5.10	5.84	0.55	3.70	14.14	141.37
Aldershot	10.14	62.77	15.36	16.05	4.11	8.54	1.92	0.00	0.00	13.21	132.11
North Camp	1.95	0.00	0.00	0.00	0.32	0.09	0.00	0.00	0.00	0.12	2.49
Other Rushmoor Borough	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09
Rushmoor Borough Sub Total	**92.81**	**66.99**	**30.45**	**18.51**	**14.07**	**13.73**	**7.76**	**0.55**	**3.70**	**27.48**	**276.05**
Blackwater	8.06	0.00	3.31	0.22	8.98	0.53	17.44	3.08	10.27	2.73	54.63
Fleet	3.64	1.57	1.38	3.90	0.65	56.75	13.08	10.59	0.00	4.82	96.38
Hook	0.00	0.00	0.00	4.91	0.00	6.51	6.36	38.56	0.00	6.26	62.61
Yateley	0.65	0.00	0.00	0.22	0.54	0.44	12.90	6.56	0.68	1.16	23.15
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.53	0.00	0.13	2.66
Odiham	0.00	0.00	0.00	0.00	0.00	0.18	0.00	2.05	0.00	0.12	2.35
Other Hart District	0.00	0.00	0.00	1.34	0.00	1.23	0.00	0.00	0.00	0.14	2.71
Hart District Sub Total	**12.35**	**1.57**	**4.69**	**10.59**	**10.18**	**65.64**	**49.79**	**63.38**	**10.95**	**15.35**	**244.49**
Food Stores in Basingstoke	0.13	0.00	0.00	0.00	0.00	0.26	0.00	8.14	0.00	n/a	8.53
Food Stores in Camberley	8.32	0.17	8.74	0.00	37.35	0.79	6.89	1.34	13.21	n/a	76.81
Food Stores in Farnham	1.30	10.83	5.15	72.47	0.97	0.97	1.13	0.79	0.00	n/a	93.62
Food Stores in The Meadows	8.84	0.58	3.04	1.34	18.62	0.97	18.92	2.61	26.50	n/a	81.41
Food Stores in Woking	0.26	0.00	12.24	0.67	2.49	0.00	0.00	0.00	0.23	n/a	15.88
Other	5.98	2.56	27.69	7.92	24.57	5.63	2.70	2.21	20.92	n/a	100.19
Other Sub-Total	**24.83**	**14.14**	**56.85**	**82.39**	**84.00**	**8.62**	**29.64**	**15.09**	**60.86**		**376.44**
TOTAL	**129.99**	**82.71**	**92.00**	**111.49**	**108.25**	**87.99**	**87.19**	**79.02**	**75.51**		**896.98**

Source: Tables 3 and 7

Table 13A: Rushmoor Summary of Convenience Goods Expenditure 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Farnborough	118.51	122.14	123.41	129.29	135.04	141.37
Rushmoor	Aldershot	103.10	106.34	115.17	120.76	126.19	132.11
	North Camp	2.05	2.11	2.18	2.28	2.38	2.49
	Other Rushmoor	0.07	0.07	0.08	0.08	0.08	0.09
	Rushmoor Sub Total	**223.73**	**230.67**	**240.84**	**252.40**	**263.69**	**276.05**
Turnover of Existing Floorspace (£m)	Farnborough	117.06	117.06	117.06	117.06	117.06	117.06
Rushmoor	Aldershot	105.51	105.51	116.61	116.61	116.61	116.61
	North Camp	4.21	4.21	4.21	4.21	4.21	4.21
	Other Rushmoor	0.07	0.07	0.07	0.07	0.07	0.07
	Rushmoor Sub Total	**226.85**	**226.85**	**237.95**	**237.95**	**237.95**	**237.95**
Surplus/Deficit Expenditure (£m)	Farnborough	1.45	5.08	6.35	12.23	17.98	24.31
Rushmoor	Aldershot	-2.41	0.83	-1.44	4.15	9.58	15.50
	North Camp	-2.15	-2.09	-2.03	-1.93	-1.83	-1.72
	Other Rushmoor	0.00	0.00	0.00	0.01	0.01	0.02
	Rushmoor Sub Total	**-3.11**	**3.82**	**2.89**	**14.45**	**25.74**	**38.10**

Source: Tables 5 – 12
Note: Commitments added at 2019

Table 13B: Hart Summary of Convenience Goods Expenditure 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Blackwater	45.42	45.90	47.58	49.94	52.21	54.63
Hart	Fleet	90.23	81.86	84.67	88.65	92.40	96.38
	Hook	26.44	52.91	54.81	57.48	59.97	62.61
	Yateley	21.25	19.64	20.32	21.29	22.19	23.15
	Hartley Wintney	2.38	2.25	2.33	2.44	2.55	2.66
	Odiham	2.19	1.99	2.06	2.16	2.25	2.35
	Other Hart	2.27	2.35	2.35	2.47	2.59	2.71
	Hart Sub Total	**190.18**	**206.88**	**214.14**	**224.43**	**234.16**	**244.49**
Turnover of Existing Floorspace (£m)	Blackwater	15.10	15.10	15.10	15.10	15.10	15.10
Hart	Fleet	70.32	70.32	70.32	70.32	70.32	70.32
	Hook	13.59	53.19	53.19	53.19	53.19	53.19
	Yateley	28.20	28.20	28.20	28.20	28.20	28.20
	Hartley Wintney	2.98	2.98	2.98	2.98	2.98	2.98
	Odiham	2.06	2.06	2.06	2.06	2.06	2.06
	Other Hart	2.27	2.27	2.27	2.27	2.27	2.27
	Hart Sub Total	**134.51**	**174.11**	**174.11**	**174.11**	**174.11**	**174.11**
Surplus/Deficit Expenditure (£m)	Blackwater	30.32	30.80	32.49	34.85	37.11	39.53
Hart	Fleet	19.91	11.54	14.35	18.33	22.08	26.06
	Hook	12.85	-0.28	1.63	4.29	6.79	9.42
	Yateley	-6.95	-8.56	-7.88	-6.92	-6.01	-5.05
	Hartley Wintney	-0.59	-0.73	-0.64	-0.53	-0.42	-0.31
	Odiham	0.13	-0.07	0.00	0.10	0.19	0.29
	Other Hart	0.00	0.08	0.09	0.21	0.32	0.44
	Hart Sub Total	**55.67**	**32.78**	**40.03**	**50.32**	**60.05**	**70.38**

Source: Tables 5 – 12
Note: Commitments added at 2018

Table 14A: Rushmoor Convenience Goods Floorspace Capacity 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£13,000	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Projection (sq.m net)	Farnborough	111	391	488	940	1,383	1,870
Rushmoor	Aldershot	-185	64	-110	319	737	1,192
	North Camp	-165	-161	-156	-148	-141	-132
	Other Rushmoor	0	0	0	1	1	1
	Rushmoor Sub Total	**-239**	**294**	**222**	**1,112**	**1,980**	**2,931**
Floorspace Projection (sq.m gross)	Farnborough	159	558	698	1,344	1,975	2,671
Rushmoor	Aldershot	-265	91	-158	456	1,053	1,704
	North Camp	-236	-230	-223	-212	-201	-189
	Other Rushmoor	0	0	0	1	1	2
	Rushmoor Sub Total	**-342**	**420**	**318**	**1,588**	**2,829**	**4,187**

Table 14B: Hart Convenience Goods Floorspace Capacity 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£13,000	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Projection (sq.m net)	Blackwater	2,332	2,370	2,499	2,681	2,855	3,041
Hart	Fleet	1,531	887	1,104	1,410	1,698	2,005
	Hook	989	-22	125	330	522	724
	Yateley	-534	-659	-606	-532	-462	-388
	Hartley Wintney	-46	-56	-50	-41	-33	-24
	Odiham	10	-6	0	7	15	22
	Other Hart	0	6	7	16	25	34
	Hart Sub Total	**4,282**	**2,521**	**3,079**	**3,871**	**4,620**	**5,414**
Floorspace Projection (sq.m gross)	Blackwater	3,332	3,385	3,570	3,829	4,078	4,344
Hart	Fleet	2,187	1,268	1,577	2,014	2,426	2,864
	Hook	1,412	-31	179	471	746	1,035
	Yateley	-764	-941	-866	-760	-660	-554
	Hartley Wintney	-65	-80	-71	-58	-47	-34
	Odiham	15	-8	0	11	21	32
	Other Hart	0	9	9	23	35	48
	Hart Sub Total	**6,117**	**3,602**	**4,399**	**5,530**	**6,599**	**7,734**

Table 15: Revised Study Area Population – Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment Projections

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,219	57,623	59,027	60,782	62,537	64,292
Zone 2 - Aldershot	37,843	39,664	42,092	44,520	47,555	50,590	53,625
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,283	40,328	41,476	42,798	43,979	45,061
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	33,400	35,548	36,553	37,333	38,113	39,108
Zone 7 - Yateley	33,518	33,809	34,197	34,480	34,790	35,100	35,500
Zone 8 - Hart (Rural West)	27,958	29,358	31,213	32,893	34,901	36,888	39,373
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**337,027**	**350,274**	**361,891**	**375,432**	**388,499**	**402,006**

Source: Experian MMG3 2011 Census Population, Hart, Rushmoor and Surrey Heath SHMA (Midpoint Employment Growth Scenario) and SNPP 2012 based projections for other LPA areas

Note: Population growth within Rushmoor and Hart redistributed

Table 16A: Rushmoor Summary of Convenience Goods Expenditure 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Farnborough	118.97	123.85	126.02	133.25	140.54	148.38
Rushmoor	Aldershot	105.03	111.43	123.38	132.94	142.64	153.00
	North Camp	2.06	2.14	2.23	2.35	2.48	2.62
	Other Rushmoor	0.07	0.08	0.09	0.09	0.10	0.11
	Rushmoor Sub Total	**226.14**	**237.51**	**251.71**	**268.63**	**285.75**	**304.11**
Turnover of Existing Floorspace (£m)	Farnborough	117.06	117.06	117.06	117.06	117.06	117.06
Rushmoor	Aldershot	105.51	105.51	116.61	116.61	116.61	116.61
	North Camp	4.21	4.21	4.21	4.21	4.21	4.21
	Other Rushmoor	0.07	0.07	0.07	0.07	0.07	0.07
	Rushmoor Sub Total	**226.85**	**226.85**	**237.95**	**237.95**	**237.95**	**237.95**
Surplus/Deficit Expenditure (£m)	Farnborough	1.91	6.79	8.95	16.19	23.47	31.31
Rushmoor	Aldershot	-0.47	5.92	6.77	16.33	26.03	36.39
	North Camp	-2.14	-2.06	-1.98	-1.85	-1.72	-1.59
	Other Rushmoor	0.00	0.01	0.01	0.02	0.03	0.04
	Rushmoor Sub Total	**-0.71**	**10.66**	**13.76**	**30.68**	**47.81**	**66.16**

Note: Commitments added at 2019

Table 16B: Hart Summary of Convenience Goods Expenditure 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Blackwater	45.46	46.22	48.06	50.70	53.31	56.19
Hart	Fleet	91.95	86.06	89.76	94.42	99.13	104.79
	Hook	27.11	55.60	58.83	63.24	67.71	73.23
	Yateley	21.28	19.83	20.60	21.72	22.85	24.21
	Hartley Wintney	2.44	2.40	2.56	2.79	3.01	3.30
	Odiham	2.25	2.12	2.26	2.45	2.64	2.89
	Other Hart	2.30	2.43	2.44	2.57	2.70	2.84
	Hart Sub Total	**192.80**	**214.65**	**224.51**	**237.89**	**251.36**	**267.44**
Turnover of Existing Floorspace (£m)	Blackwater	15.10	15.10	15.10	15.10	15.10	15.10
Hart	Fleet	70.32	70.32	70.32	70.32	70.32	70.32
	Hook	13.59	53.19	53.19	53.19	53.19	53.19
	Yateley	28.20	28.20	28.20	28.20	28.20	28.20
	Hartley Wintney	2.98	2.98	2.98	2.98	2.98	2.98
	Odiham	2.06	2.06	2.06	2.06	2.06	2.06
	Other Hart	2.30	2.30	2.30	2.30	2.30	2.30
	Hart Sub Total	**134.54**	**174.14**	**174.14**	**174.14**	**174.14**	**174.14**
Surplus/Deficit Expenditure (£m)	Blackwater	30.37	31.12	32.96	35.60	38.22	41.09
Hart	Fleet	21.63	15.74	19.44	24.10	28.81	34.46
	Hook	13.52	2.41	5.64	10.05	14.52	20.05
	Yateley	-6.92	-8.37	-7.60	-6.48	-5.35	-3.99
	Hartley Wintney	-0.53	-0.58	-0.41	-0.19	0.04	0.33
	Odiham	0.19	0.06	0.20	0.39	0.58	0.83
	Other Hart	0.00	0.13	0.15	0.27	0.40	0.54
	Hart Sub Total	**58.26**	**40.51**	**50.37**	**63.75**	**77.22**	**93.31**

Note: Commitments added at 2018

Table 17A: Rushmoor Convenience Goods Floorspace Capacity 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£13,000	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Projection (sq.m net)	Farnborough	147	522	689	1,245	1,806	2,409
Rushmoor	Aldershot	-37	456	521	1,256	2,002	2,799
	North Camp	-165	-159	-152	-142	-133	-122
	Other Rushmoor	0	0	1	1	2	3
	Rushmoor Sub Total	**-55**	**820**	**1,058**	**2,360**	**3,677**	**5,089**
Floorspace Projection (sq.m gross)	Farnborough	209	746	984	1,779	2,580	3,441
Rushmoor	Aldershot	-52	651	744	1,794	2,860	3,999
	North Camp	-235	-227	-217	-204	-189	-174
	Other Rushmoor	0	1	1	2	3	4
	Rushmoor Sub Total	**-78**	**1,171**	**1,512**	**3,372**	**5,253**	**7,270**

Table 17B: Hart Convenience Goods Floorspace Capacity 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£13,000	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Projection (sq.m net)	Blackwater	2,336	2,394	2,535	2,739	2,940	3,161
Hart	Fleet	1,664	1,210	1,495	1,854	2,216	2,651
	Hook	1,040	186	434	773	1,117	1,542
	Yateley	-532	-644	-584	-498	-412	-307
	Hartley Wintney	-41	-44	-32	-15	3	25
	Odiham	15	4	15	30	45	64
	Other Hart	0	10	11	21	31	41
	Hart Sub Total	**4,481**	**3,116**	**3,875**	**4,904**	**5,940**	**7,177**
Floorspace Projection (sq.m gross)	Blackwater	3,337	3,420	3,622	3,912	4,200	4,516
Hart	Fleet	2,377	1,729	2,136	2,649	3,166	3,787
	Hook	1,486	265	620	1,105	1,596	2,203
	Yateley	-760	-920	-835	-712	-588	-438
	Hartley Wintney	-59	-63	-45	-21	4	36
	Odiham	21	6	22	43	64	91
	Other Hart	0	14	16	30	44	59
	Hart Sub Total	**6,402**	**4,452**	**5,535**	**7,005**	**8,486**	**10,253**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population – Baseline Projections

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,166	57,107	58,107	59,283	60,400	61,635
Zone 2 - Aldershot	37,843	38,529	39,174	39,860	40,667	41,434	42,281
Zone 3 - Guildford (Rural West)	34,670	35,874	37,079	38,077	39,253	40,307	41,200
Zone 4 - Farnham	38,678	39,335	40,417	41,541	42,794	43,892	44,842
Zone 5 - Camberley	39,951	40,368	41,017	41,759	42,593	43,427	44,261
Zone 6 - Fleet	31,789	32,488	33,151	33,815	34,514	35,108	35,667
Zone 7 - Yateley	33,518	34,255	34,954	35,654	36,391	37,017	37,606
Zone 8 - Hart (Rural West)	27,958	28,621	29,281	29,932	30,618	31,200	31,742
Zone 9 - Sandhurst	27,298	28,216	29,281	30,308	31,363	32,289	33,149
Total	**326,871**	**333,852**	**341,462**	**349,053**	**357,475**	**365,073**	**372,383**

Source: Experian MMG3 2011 Census Population and SNPP 2012 based projections

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	2,937	3,259	3,654	4,309	5,086	6,004
Zone 2 - Aldershot	2,738	3,038	3,406	4,016	4,741	5,596
Zone 3 - Guildford (Rural West)	3,198	3,549	3,979	4,692	5,538	6,538
Zone 4 - Farnham	3,711	4,118	4,617	5,444	6,426	7,586
Zone 5 - Camberley	3,630	4,028	4,516	5,325	6,286	7,420
Zone 6 - Fleet	3,728	4,136	4,638	5,469	6,455	7,620
Zone 7 - Yateley	3,349	3,716	4,167	4,913	5,800	6,846
Zone 8 - Hart (Rural West)	3,733	4,142	4,644	5,476	6,464	7,630
Zone 9 - Sandhurst	3,204	3,555	3,986	4,700	5,548	6,549

Sources:
Experian Local Expenditure 2013 (2013 prices)
Growth Rates: 5.6% 2013-2014, 4.4% 2014-2015, 3.1% 2015 -2016 and 3.3% p.a. from 2016
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	164.97	186.11	212.34	255.43	307.21	370.05
Zone 2 - Aldershot	105.48	119.00	135.77	163.32	196.42	236.61
Zone 3 - Guildford (Rural West)	114.74	131.58	151.52	184.16	223.23	269.35
Zone 4 - Farnham	145.98	166.43	191.81	232.97	282.07	340.17
Zone 5 - Camberley	146.54	165.20	188.60	226.81	272.98	328.42
Zone 6 - Fleet	121.11	137.13	156.84	188.74	226.64	271.79
Zone 7 - Yateley	114.73	129.90	148.58	178.80	214.70	257.47
Zone 8 - Hart (Rural West)	106.83	121.27	139.00	167.65	201.66	242.18
Zone 9 - Sandhurst	90.40	104.09	120.81	147.41	179.14	217.09
Total	**1,110.78**	**1,260.70**	**1,445.27**	**1,745.29**	**2,104.04**	**2,533.13**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	% Inflow
Farnborough (incl. Retail Warehousing)	54.5%	26.8%	29.4%	15.5%	25.4%	24.6%	25.9%	7.3%	19.9%	10.0%
Aldershot	1.5%	30.5%	6.4%	5.3%	0.9%	4.9%	0.7%	0.0%	0.5%	10.0%
North Camp	1.1%	0.7%	0.5%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Rushmoor Borough	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Rushmoor Borough Sub Total	**57.2%**	**58.0%**	**36.3%**	**21.2%**	**26.5%**	**29.5%**	**26.6%**	**7.3%**	**20.4%**	
Blackwater	1.0%	0.2%	0.5%	0.3%	0.7%	0.9%	1.5%	0.3%	0.2%	5.0%
Fleet	2.0%	0.7%	0.1%	3.1%	0.3%	31.0%	5.4%	5.4%	0.5%	5.0%
Hook	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	2.6%	0.0%	5.0%
Yateley	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.3%	0.3%	5.0%
Hartley Wintney	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	1.1%	0.0%	5.0%
Odiham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	5.0%
Other Hart District	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Hart District Sub Total	**3.1%**	**0.9%**	**0.6%**	**3.6%**	**1.0%**	**32.1%**	**9.1%**	**10.8%**	**1.0%**	
Farnham	1.6%	6.3%	1.2%	35.6%	1.5%	2.9%	1.4%	3.1%	0.1%	n/a
Camberley	15.9%	12.2%	18.7%	5.8%	43.9%	6.8%	31.1%	5.4%	40.0%	n/a
Woking	0.9%	0.5%	10.0%	0.3%	1.1%	0.3%	0.1%	0.0%	0.1%	n/a
Guildford	4.8%	11.4%	19.4%	16.6%	4.4%	3.9%	1.5%	1.3%	3.6%	n/a
The Meadows/Sandhurst	3.1%	0.6%	2.0%	0.7%	3.9%	1.0%	9.7%	1.2%	15.2%	n/a
Basingstoke	6.2%	3.2%	0.3%	5.9%	1.3%	10.8%	6.7%	44.6%	2.2%	n/a
Reading	2.5%	0.5%	1.7%	1.3%	2.9%	7.6%	8.5%	13.6%	4.9%	n/a
Other	4.7%	6.4%	9.8%	9.0%	13.5%	5.1%	5.3%	12.7%	12.5%	n/a
Other Sub-Total	**39.7%**	**41.1%**	**63.1%**	**75.2%**	**72.5%**	**38.4%**	**64.3%**	**81.9%**	**78.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2014	**164.97**	**105.48**	**114.74**	**145.98**	**146.54**	**121.11**	**114.73**	**106.83**	**90.40**		**1,110.78**
Farnborough (incl. Retail Warehousing)	89.91	28.27	33.73	22.63	37.22	29.79	29.72	7.80	17.99	33.01	330.06
Aldershot	2.47	32.17	7.34	7.74	1.32	5.93	0.80	0.00	0.45	6.47	64.70
North Camp	1.81	0.74	0.57	0.58	0.29	0.00	0.00	0.00	0.00	0.21	4.21
Other Rushmoor Borough	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.17
Rushmoor Borough Sub Total	**94.36**	**61.18**	**41.65**	**30.95**	**38.83**	**35.73**	**30.52**	**7.80**	**18.44**	**39.70**	**399.15**
Blackwater	1.65	0.21	0.57	0.44	1.03	1.09	1.72	0.32	0.18	0.38	7.59
Fleet	3.30	0.74	0.11	4.53	0.44	37.54	6.20	5.77	0.45	3.11	62.19
Hook	0.00	0.00	0.00	0.15	0.00	0.00	0.00	2.78	0.00	0.15	3.08
Yateley	0.16	0.00	0.00	0.00	0.00	0.00	2.41	0.32	0.27	0.17	3.33
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.24	0.11	1.18	0.00	0.08	1.61
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18	0.00	0.06	1.24
Other Hart District	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.01	0.15
Hart District Sub Total	**5.11**	**0.95**	**0.69**	**5.26**	**1.47**	**38.88**	**10.44**	**11.54**	**0.90**	**3.96**	**79.19**
Farnham	2.64	6.65	1.38	51.97	2.20	3.51	1.61	3.31	0.09	n/a	73.35
Camberley	26.23	12.87	21.46	8.47	64.33	8.24	35.68	5.77	36.16	n/a	219.20
Woking	1.48	0.53	11.47	0.44	1.61	0.36	0.11	0.00	0.09	n/a	16.10
Guildford	7.92	12.02	22.26	24.23	6.45	4.72	1.72	1.39	3.25	n/a	83.97
The Meadows/Sandhurst	5.11	0.63	2.29	1.02	5.71	1.21	11.13	1.28	13.74	n/a	42.14
Basingstoke	10.23	3.38	0.34	8.61	1.90	13.08	7.69	47.65	1.99	n/a	94.87
Reading	4.12	0.53	1.95	1.90	4.25	9.20	9.75	14.53	4.43	n/a	50.66
Other	7.75	6.75	11.24	13.14	19.78	6.18	6.08	13.57	11.30	n/a	95.79
Other Sub-Total	**65.49**	**43.35**	**72.40**	**109.78**	**106.24**	**46.51**	**73.77**	**87.49**	**71.06**		**676.09**
TOTAL	**164.97**	**105.48**	**114.74**	**145.98**	**146.54**	**121.11**	**114.73**	**106.83**	**90.40**		**1,154.43**

Source: Tables 3 and 4

Table 6A: Rushmoor Comparison Goods Floorspace 2014 and Commitments

Centre/Facility	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Farnborough		
Farnborough Town Centre	20,160	14,112
Comparison sales in food stores	n/a	3,019
Solartron Retail Park:		
DFS	1,749	1,399
Pets at Home	1,033	826
Betta Living	576	461
Carpetright	970	776
SCS	730	584
Dreams	749	599
Harveys	523	418
Maplin	528	422
Furniture Village	1,367	1,094
Westmead (adjacent to Solartron RP):		
PC World	2,607	2,086
B&Q, Invincible Road	12,322	9,858
Farnborough Gate Retail Park:		
TK Maxx	2,107	1,686
Next	1,009	807
Halfords	929	743
Outfit	836	669
Boots	650	520
Bensons for Beds	558	446
Mamas & Papas	418	334
Homesense	1,241	993
Currys/PC World	2,052	1,642
Farnborough Sub Total	**53,114**	**43,494**
North Camp		
North Camp Town Centre	7,380	5,166
Comparison sales in food stores	n/a	11
North Camp Sub Total	**7,380**	**5,177**
Aldershot		
Aldershot Town Centre	22,544	15,781
Comparison sales in food stores	n/a	1,467
Aldershot Sub Total	**22,544**	**17,248**
Rushmoor Total	**83,038**	**65,919**
Commitments	**Gross Floorspace (sq.m)**	**Sales Floorspace (sq.m net)**
Pyramid House, Farnborough *	8,438	6,780
Aldershot Urban Extension	1,560	1,092
Northern Queensmead Block 3	2,746	1,922
Northern Queensmead Block 4	1,300	910
Invincible Road, Farnborough	1,237	990
Total	**15,281**	**11,694**

** Net increase minus existing PC World*

Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 6B: Hart Comparison Goods Floorspace 2014 and Commitments

Centre/Facility	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Blackwater		
Blackwater Town Centre	822	575
Comparison sales in food stores	n/a	235
Blackwater Sub Total	**822**	**810**
Fleet		
Fleet Town Centre	14,860	10,402
Comparison sales in food stores	n/a	657
Fleet Sub Total	**14,860**	**11,059**
Hook		
Hook Town Centre	1,200	840
Comparison sales in food stores	n/a	111
Hook Sub Total	**1,200**	**951**
Odiham		
Odiham Town Centre	835	585
Comparison sales in food stores	n/a	8
Odiham Sub Total	**835**	**593**
Yateley		
Yateley Town Centre	1,404	983
Comparison sales in food stores	n/a	253
Yateley Sub Total	**1,404**	**1,236**
Hartley Wintney		
Hartley Wintney Town Centre	1,400	980
Hart Total	**20,521**	**15,629**
Commitments	**Gross Floorspace (sq.m)**	**Sales Floorspace (sq.m net)**
Sainsbury's, London Road, Hook	n/a	263

Source: ORC StorePoint 2014, VOA, Goad and Verdict

Table 7: Comparison Goods Expenditure 2018 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2018	**186.11**	**119.00**	**131.58**	**166.43**	**165.20**	**137.13**	**129.90**	**121.27**	**104.09**		**1,260.70**
Farnborough (incl. Retail Warehousing)	101.43	31.89	38.68	25.80	41.96	33.73	33.64	8.85	20.71	37.41	374.12
Aldershot	2.79	36.29	8.42	8.82	1.49	6.72	0.91	0.00	0.52	7.33	73.29
North Camp	2.05	0.83	0.66	0.67	0.33	0.00	0.00	0.00	0.00	0.24	4.77
Other Rushmoor Borough	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.20
Rushmoor Borough Sub Total	**106.46**	**69.02**	**47.76**	**35.28**	**43.78**	**40.45**	**34.55**	**8.85**	**21.23**	**44.99**	**452.38**
Blackwater	1.86	0.24	0.66	0.50	1.16	1.23	1.95	0.36	0.21	0.43	8.60
Fleet	3.72	0.83	0.13	5.16	0.50	42.51	7.01	6.55	0.52	3.52	70.46
Hook	0.00	0.00	0.00	0.17	0.00	0.00	0.00	3.15	0.00	0.17	3.49
Yateley	0.19	0.00	0.00	0.00	0.00	0.00	2.73	0.36	0.31	0.19	3.78
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.27	0.13	1.33	0.00	0.09	1.83
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.33	0.00	0.07	1.40
Other Hart District	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.01	0.18
Hart District Sub Total	**5.77**	**1.07**	**0.79**	**5.99**	**1.65**	**44.02**	**11.82**	**13.10**	**1.04**	**4.49**	**89.74**
Farnham	2.98	7.50	1.58	59.25	2.48	3.98	1.82	3.76	0.10	n/a	83.44
Camberley	29.59	14.52	24.61	9.65	72.52	9.32	40.40	6.55	41.64	n/a	248.80
Woking	1.67	0.59	13.16	0.50	1.82	0.41	0.13	0.00	0.10	n/a	18.39
Guildford	8.93	13.57	25.53	27.63	7.27	5.35	1.95	1.58	3.75	n/a	95.54
The Meadows/Sandhurst	5.77	0.71	2.63	1.16	6.44	1.37	12.60	1.46	15.82	n/a	47.97
Basingstoke	11.54	3.81	0.39	9.82	2.15	14.81	8.70	54.09	2.29	n/a	107.60
Reading	4.65	0.59	2.24	2.16	4.79	10.42	11.04	16.49	5.10	n/a	57.50
Other	8.75	7.62	12.89	14.98	22.30	6.99	6.88	15.40	13.01	n/a	108.83
Other Sub-Total	**73.89**	**48.91**	**83.03**	**125.15**	**119.77**	**52.66**	**83.53**	**99.32**	**81.81**		**768.06**
TOTAL	**186.11**	**119.00**	**131.58**	**166.43**	**165.20**	**137.13**	**129.90**	**121.27**	**104.09**		**1,310.18**

Source: Tables 3 and 4

Table 8: Comparison Goods Expenditure 2022 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2022	**212.34**	**135.77**	**151.52**	**191.81**	**188.60**	**156.84**	**148.58**	**139.00**	**120.81**		**1,445.27**
Farnborough (incl. Retail Warehousing)	115.73	36.39	44.55	29.73	47.90	38.58	38.48	10.15	24.04	42.84	428.39
Aldershot	3.19	41.41	9.70	10.17	1.70	7.69	1.04	0.00	0.60	8.39	83.87
North Camp	2.34	0.95	0.76	0.77	0.38	0.00	0.00	0.00	0.00	0.27	5.46
Other Rushmoor Borough	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.22
Rushmoor Borough Sub Total	**121.46**	**78.75**	**55.00**	**40.66**	**49.98**	**46.27**	**39.52**	**10.15**	**24.65**	**51.51**	**517.94**
Blackwater	2.12	0.27	0.76	0.58	1.32	1.41	2.23	0.42	0.24	0.49	9.84
Fleet	4.25	0.95	0.15	5.95	0.57	48.62	8.02	7.51	0.60	4.03	80.65
Hook	0.00	0.00	0.00	0.19	0.00	0.00	0.00	3.61	0.00	0.20	4.01
Yateley	0.21	0.00	0.00	0.00	0.00	0.00	3.12	0.42	0.36	0.22	4.33
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.31	0.15	1.53	0.00	0.10	2.10
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.53	0.00	0.08	1.61
Other Hart District	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.01	0.20
Hart District Sub Total	**6.58**	**1.22**	**0.91**	**6.91**	**1.89**	**50.35**	**13.52**	**15.01**	**1.21**	**5.14**	**102.73**
Farnham	3.40	8.55	1.82	68.28	2.83	4.55	2.08	4.31	0.12	n/a	95.94
Camberley	33.76	16.56	28.33	11.12	82.79	10.67	46.21	7.51	48.33	n/a	285.28
Woking	1.91	0.68	15.15	0.58	2.07	0.47	0.15	0.00	0.12	n/a	21.13
Guildford	10.19	15.48	29.39	31.84	8.30	6.12	2.23	1.81	4.35	n/a	109.70
The Meadows/Sandhurst	6.58	0.81	3.03	1.34	7.36	1.57	14.41	1.67	18.36	n/a	55.14
Basingstoke	13.17	4.34	0.45	11.32	2.45	16.94	9.95	61.99	2.66	n/a	123.28
Reading	5.31	0.68	2.58	2.49	5.47	11.92	12.63	18.90	5.92	n/a	65.90
Other	9.98	8.69	14.85	17.26	25.46	8.00	7.87	17.65	15.10	n/a	124.87
Other Sub-Total	**84.30**	**55.80**	**95.61**	**144.24**	**136.73**	**60.23**	**95.54**	**113.84**	**94.96**		**881.24**
TOTAL	**212.34**	**135.77**	**151.52**	**191.81**	**188.60**	**156.84**	**148.58**	**139.00**	**120.81**		**1,501.91**

Source: Tables 3 and 4

Table 9: Comparison Goods Expenditure 2027 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2027	**255.43**	**163.32**	**184.16**	**232.97**	**226.81**	**188.74**	**178.80**	**167.65**	**147.41**		**1,745.29**
Farnborough (incl. Retail Warehousing)	139.21	43.77	54.14	36.11	57.61	46.43	46.31	12.24	29.33	51.68	516.84
Aldershot	3.83	49.81	11.79	12.35	2.04	9.25	1.25	0.00	0.74	10.12	101.17
North Camp	2.81	1.14	0.92	0.93	0.45	0.00	0.00	0.00	0.00	0.33	6.59
Other Rushmoor Borough	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.27
Rushmoor Borough Sub Total	**146.11**	**94.73**	**66.85**	**49.39**	**60.10**	**55.68**	**47.56**	**12.24**	**30.07**	**62.14**	**624.87**
Blackwater	2.55	0.33	0.92	0.70	1.59	1.70	2.68	0.50	0.29	0.59	11.86
Fleet	5.11	1.14	0.18	7.22	0.68	58.51	9.66	9.05	0.74	4.86	97.15
Hook	0.00	0.00	0.00	0.23	0.00	0.00	0.00	4.36	0.00	0.24	4.83
Yateley	0.26	0.00	0.00	0.00	0.00	0.00	3.75	0.50	0.44	0.26	5.22
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.38	0.18	1.84	0.00	0.13	2.53
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.84	0.00	0.10	1.94
Other Hart District	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	0.01	0.25
Hart District Sub Total	**7.92**	**1.47**	**1.10**	**8.39**	**2.27**	**60.59**	**16.27**	**18.11**	**1.47**	**6.19**	**123.77**
Farnham	4.09	10.29	2.21	82.94	3.40	5.47	2.50	5.20	0.15	n/a	116.25
Camberley	40.61	19.92	34.44	13.51	99.57	12.83	55.61	9.05	58.96	n/a	344.52
Woking	2.30	0.82	18.42	0.70	2.49	0.57	0.18	0.00	0.15	n/a	25.62
Guildford	12.26	18.62	35.73	38.67	9.98	7.36	2.68	2.18	5.31	n/a	132.79
The Meadows/Sandhurst	7.92	0.98	3.68	1.63	8.85	1.89	17.34	2.01	22.41	n/a	66.71
Basingstoke	15.84	5.23	0.55	13.75	2.95	20.38	11.98	74.77	3.24	n/a	148.69
Reading	6.39	0.82	3.13	3.03	6.58	14.34	15.20	22.80	7.22	n/a	79.50
Other	12.01	10.45	18.05	20.97	30.62	9.63	9.48	21.29	18.43	n/a	150.91
Other Sub-Total	**101.41**	**67.12**	**116.21**	**175.19**	**164.44**	**72.48**	**114.97**	**137.30**	**115.86**		**1,064.98**
TOTAL	**255.43**	**163.32**	**184.16**	**232.97**	**226.81**	**188.74**	**178.80**	**167.65**	**147.41**		**1,813.63**

Source: Tables 3 and 4

Table 10: Comparison Goods Expenditure 2032 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2032	**307.21**	**196.42**	**223.23**	**282.07**	**272.98**	**226.64**	**214.70**	**201.66**	**179.14**		**2,104.04**
Farnborough (incl. Retail Warehousing)	167.43	52.64	65.63	43.72	69.34	55.75	55.61	14.72	35.65	62.28	622.76
Aldershot	4.61	59.91	14.29	14.95	2.46	11.11	1.50	0.00	0.90	12.19	121.90
North Camp	3.38	1.37	1.12	1.13	0.55	0.00	0.00	0.00	0.00	0.40	7.94
Other Rushmoor Borough	0.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.32
Rushmoor Borough Sub Total	**175.72**	**113.93**	**81.03**	**59.80**	**72.34**	**66.86**	**57.11**	**14.72**	**36.54**	**74.88**	**752.93**
Blackwater	3.07	0.39	1.12	0.85	1.91	2.04	3.22	0.60	0.36	0.71	14.28
Fleet	6.14	1.37	0.22	8.74	0.82	70.26	11.59	10.89	0.90	5.84	116.78
Hook	0.00	0.00	0.00	0.28	0.00	0.00	0.00	5.24	0.00	0.29	5.82
Yateley	0.31	0.00	0.00	0.00	0.00	0.00	4.51	0.60	0.54	0.31	6.27
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.45	0.21	2.22	0.00	0.15	3.04
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.22	0.00	0.12	2.34
Other Hart District	0.00	0.00	0.00	0.28	0.00	0.00	0.00	0.00	0.00	0.01	0.30
Hart District Sub Total	**9.52**	**1.77**	**1.34**	**10.15**	**2.73**	**72.75**	**19.54**	**21.78**	**1.79**	**7.44**	**148.81**
Farnham	4.92	12.37	2.68	100.42	4.09	6.57	3.01	6.25	0.18	n/a	140.49
Camberley	48.85	23.96	41.74	16.36	119.84	15.41	66.77	10.89	71.66	n/a	415.48
Woking	2.76	0.98	22.32	0.85	3.00	0.68	0.21	0.00	0.18	n/a	30.99
Guildford	14.75	22.39	43.31	46.82	12.01	8.84	3.22	2.62	6.45	n/a	160.41
The Meadows/Sandhurst	9.52	1.18	4.46	1.97	10.65	2.27	20.83	2.42	27.23	n/a	80.53
Basingstoke	19.05	6.29	0.67	16.64	3.55	24.48	14.38	89.94	3.94	n/a	178.94
Reading	7.68	0.98	3.79	3.67	7.92	17.22	18.25	27.43	8.78	n/a	95.72
Other	14.44	12.57	21.88	25.39	36.85	11.56	11.38	25.61	22.39	n/a	182.07
Other Sub-Total	**121.96**	**80.73**	**140.86**	**212.11**	**197.91**	**87.03**	**138.05**	**165.16**	**140.80**		**1,284.62**
TOTAL	**307.21**	**196.42**	**223.23**	**282.07**	**272.98**	**226.64**	**214.70**	**201.66**	**179.14**		**2,186.36**

Source: Tables 3 and 4

Table 11: Comparison Goods Expenditure 2037 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2037	**370.05**	**236.61**	**269.35**	**340.17**	**328.42**	**271.79**	**257.47**	**242.18**	**217.09**		**2,533.13**
Farnborough (incl. Retail Warehousing)	201.68	63.41	79.19	52.73	83.42	66.86	66.68	17.68	43.20	74.98	749.83
Aldershot	5.55	72.16	17.24	18.03	2.96	13.32	1.80	0.00	1.09	14.68	146.83
North Camp	4.07	1.66	1.35	1.36	0.66	0.00	0.00	0.00	0.00	0.48	9.57
Other Rushmoor Borough	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.39
Rushmoor Borough Sub Total	**211.67**	**137.23**	**97.77**	**72.12**	**87.03**	**80.18**	**68.49**	**17.68**	**44.29**	**90.16**	**906.62**
Blackwater	3.70	0.47	1.35	1.02	2.30	2.45	3.86	0.73	0.43	0.86	17.17
Fleet	7.40	1.66	0.27	10.55	0.99	84.25	13.90	13.08	1.09	7.01	140.19
Hook	0.00	0.00	0.00	0.34	0.00	0.00	0.00	6.30	0.00	0.35	6.99
Yateley	0.37	0.00	0.00	0.00	0.00	0.00	5.41	0.73	0.65	0.38	7.53
Hartley Wintney	0.00	0.00	0.00	0.00	0.00	0.54	0.26	2.66	0.00	0.18	3.65
Odiham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.66	0.00	0.14	2.80
Other Hart District	0.00	0.00	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.02	0.36
Hart District Sub Total	**11.47**	**2.13**	**1.62**	**12.25**	**3.28**	**87.24**	**23.43**	**26.16**	**2.17**	**8.93**	**178.68**
Farnham	5.92	14.91	3.23	121.10	4.93	7.88	3.60	7.51	0.22	n/a	169.30
Camberley	58.84	28.87	50.37	19.73	144.18	18.48	80.07	13.08	86.84	n/a	500.45
Woking	3.33	1.18	26.93	1.02	3.61	0.82	0.26	0.00	0.22	n/a	37.37
Guildford	17.76	26.97	52.25	56.47	14.45	10.60	3.86	3.15	7.82	n/a	193.33
The Meadows/Sandhurst	11.47	1.42	5.39	2.38	12.81	2.72	24.97	2.91	33.00	n/a	97.06
Basingstoke	22.94	7.57	0.81	20.07	4.27	29.35	17.25	108.01	4.78	n/a	215.06
Reading	9.25	1.18	4.58	4.42	9.52	20.66	21.88	32.94	10.64	n/a	115.08
Other	17.39	15.14	26.40	30.61	44.34	13.86	13.65	30.76	27.14	n/a	219.28
Other Sub-Total	**146.91**	**97.25**	**169.96**	**255.81**	**238.11**	**104.37**	**165.55**	**198.35**	**170.63**		**1,546.93**
TOTAL	**370.05**	**236.61**	**269.35**	**340.17**	**328.42**	**271.79**	**257.47**	**242.18**	**217.09**		**2,632.23**

Source: Tables 3 and 4

Table 12A: Rushmoor Summary of Comparison Goods Expenditure 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Farnborough (incl. Retail Warehousing)	330.06	374.12	428.39	516.84	622.76	749.83
Rushmoor	Aldershot	64.70	73.29	83.87	101.17	121.90	146.83
	North Camp	4.21	4.77	5.46	6.59	7.94	9.57
	Other Rushmoor	0.17	0.20	0.22	0.27	0.32	0.39
	Rushmoor Sub Total	**399.15**	**452.38**	**517.94**	**624.87**	**752.93**	**906.62**
Turnover of Existing Floorspace (£m)	Farnborough (incl. Retail Warehousing)	330.06	401.40	443.07	501.29	567.16	641.69
Rushmoor	Aldershot	64.70	71.42	84.57	95.69	108.26	122.49
	North Camp	4.21	4.65	5.13	5.81	6.57	7.44
	Other Rushmoor	0.17	0.19	0.21	0.24	0.27	0.31
	Rushmoor Sub Total	**399.15**	**477.66**	**532.99**	**603.02**	**682.27**	**771.92**
Surplus/Deficit Expenditure (£m)	Farnborough (incl. Retail Warehousing)	n/a	-27.28	-14.68	15.55	55.60	108.14
Rushmoor	Aldershot	n/a	1.87	-0.70	5.49	13.64	24.34
	North Camp	n/a	0.12	0.33	0.78	1.37	2.13
	Other Rushmoor	n/a	0.00	0.01	0.03	0.05	0.08
	Rushmoor Sub Total	**n/a**	**-25.28**	**-15.04**	**21.85**	**70.67**	**134.70**

Source: Tables 5 – 11

Commitments added at 2019

Table 12B: Hart Summary of Comparison Goods Expenditure 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Blackwater	7.59	8.60	9.84	11.86	14.28	17.17
Hart	Fleet	62.19	70.46	80.65	97.15	116.78	140.19
	Hook	3.08	3.49	4.01	4.83	5.82	6.99
	Yateley	3.33	3.78	4.33	5.22	6.27	7.53
	Hartley Wintney	1.61	1.83	2.10	2.53	3.04	3.65
	Odiham	1.24	1.40	1.61	1.94	2.34	2.80
	Other Hart	0.15	0.18	0.20	0.25	0.30	0.36
	Hart Sub Total	**79.19**	**89.74**	**102.73**	**123.77**	**148.81**	**178.68**
Turnover of Existing Floorspace (£m)	Blackwater	7.59	8.38	9.25	10.46	11.84	13.39
Hart	Fleet	62.19	68.64	75.77	85.73	96.99	109.74
	Hook	3.08	5.53	6.11	6.91	7.82	8.85
	Yateley	3.33	3.68	4.06	4.59	5.20	5.88
	Hartley Wintney	1.61	1.78	1.96	2.22	2.52	2.85
	Odiham	1.24	1.37	1.51	1.71	1.93	2.18
	Other Hart	0.15	0.17	0.19	0.21	0.24	0.27
	Hart Sub Total	**79.19**	**89.55**	**98.85**	**111.84**	**126.53**	**143.16**
Surplus/Deficit Expenditure (£m)	Blackwater	n/a	0.22	0.59	1.40	2.44	3.77
Hart	Fleet	n/a	1.81	4.88	11.43	19.79	30.45
	Hook	n/a	-2.04	-2.10	-2.08	-2.00	-1.86
	Yateley	n/a	0.10	0.27	0.62	1.07	1.65
	Hartley Wintney	n/a	0.05	0.13	0.30	0.52	0.80
	Odiham	n/a	0.04	0.10	0.24	0.41	0.62
	Other Hart	n/a	0.01	0.01	0.03	0.06	0.09
	Hart Sub Total	**n/a**	**0.19**	**3.88**	**11.94**	**22.28**	**35.52**

Source: Tables 5 – 11

Commitments added at 2018

Table 13A: Rushmoor Comparison Goods Floorspace Capacity 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£5,000	£5,519	£6,092	£6,893	£7,798	£8,823
Floorspace Projection (sq.m net)	Farnborough (incl. Retail Warehousing)	n/a	-4,942	-2,410	2,256	7,130	12,256
Rushmoor	Aldershot	n/a	339	-115	796	1,750	2,759
	North Camp	n/a	22	54	113	176	242
	Other Rushmoor	n/a	1	2	4	7	9
	Rushmoor Sub Total	**n/a**	**-4,581**	**-2,470**	**3,170**	**9,062**	**15,266**
Floorspace Projection (sq.m gross)	Farnborough (incl. Retail Warehousing)	n/a	-7,061	-3,443	3,223	10,185	17,509
Rushmoor	Aldershot	n/a	484	-164	1,137	2,500	3,941
	North Camp	n/a	31	77	161	251	345
	Other Rushmoor	n/a	1	3	6	10	13
	Rushmoor Sub Total	**n/a**	**-6,544**	**-3,528**	**4,528**	**12,945**	**21,809**

Table 13B: Hart Comparison Goods Floorspace Capacity 2014 to 2037

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£5,000	£5,519	£6,092	£6,893	£7,798	£8,823
Floorspace Projection (sq.m net)	Blackwater	n/a	40	97	203	313	428
Hart	Fleet	n/a	329	801	1,658	2,538	3,451
	Hook	n/a	-370	-345	-302	-257	-211
	Yateley	n/a	18	44	90	138	187
	Hartley Wintney	n/a	9	22	44	67	91
	Odiham	n/a	7	17	34	52	70
	Other Hart	n/a	1	2	5	7	10
	Hart Sub Total	**n/a**	**34**	**637**	**1,732**	**2,857**	**4,026**
Floorspace Projection (sq.m gross)	Blackwater	n/a	57	139	290	447	611
Hart	Fleet	n/a	469	1,144	2,368	3,625	4,930
	Hook	n/a	-528	-493	-431	-367	-301
	Yateley	n/a	26	63	129	197	267
	Hartley Wintney	n/a	13	31	63	96	130
	Odiham	n/a	10	24	49	74	101
	Other Hart	n/a	1	3	7	10	14
	Hart Sub Total	**n/a**	**48**	**910**	**2,475**	**4,082**	**5,752**

Table 14: Revised Study Area Population – Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment Projections

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,219	57,623	59,027	60,782	62,537	64,292
Zone 2 - Aldershot	37,843	39,664	42,092	44,520	47,555	50,590	53,625
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,283	40,328	41,476	42,798	43,979	45,061
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	33,400	35,548	36,553	37,333	38,113	39,108
Zone 7 - Yateley	33,518	33,809	34,197	34,480	34,790	35,100	35,500
Zone 8 - Hart (Rural West)	27,958	29,358	31,213	32,893	34,901	36,888	39,373
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**337,027**	**350,274**	**361,891**	**375,432**	**388,499**	**402,006**

Source: Experian MMG3 2011 Census Population, Hart, Rushmoor and Surrey Heath SHMA (Midpoint Employment Growth Scenario) and SNPP 2012 based projections for other LPA areas

Note: Population growth within Rushmoor and Hart redistributed

Table 15A: Rushmoor Summary of Comparison Goods Expenditure 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Farnborough (incl. Retail Warehousing)	332.59	382.31	441.66	538.63	656.33	799.26
Rushmoor	Aldershot	65.97	76.94	90.14	111.77	138.32	170.77
	North Camp	4.24	4.87	5.64	6.91	8.46	10.33
	Other Rushmoor	0.17	0.20	0.23	0.28	0.33	0.41
	Rushmoor Sub Total	**402.98**	**464.31**	**537.66**	**657.59**	**803.44**	**980.77**
Turnover of Existing Floorspace (£m)	Farnborough (incl. Retail Warehousing)	332.59	404.19	446.15	504.78	571.11	646.16
Rushmoor	Aldershot	65.97	72.82	86.12	97.43	110.23	124.72
	North Camp	4.24	4.69	5.17	5.85	6.62	7.49
	Other Rushmoor	0.17	0.19	0.21	0.24	0.27	0.31
	Rushmoor Sub Total	**402.98**	**481.89**	**537.65**	**608.30**	**688.24**	**778.68**
Surplus/Deficit Expenditure (£m)	Farnborough (incl. Retail Warehousing)	n/a	-21.88	-4.49	33.85	85.22	153.11
Rushmoor	Aldershot	n/a	4.12	4.02	14.34	28.08	46.05
	North Camp	n/a	0.19	0.47	1.06	1.84	2.84
	Other Rushmoor	n/a	0.01	0.02	0.04	0.06	0.10
	Rushmoor Sub Total	**n/a**	**-17.57**	**0.01**	**49.29**	**115.20**	**202.09**

Note: Commitments added at 2019

Table 15B: Hart Summary of Comparison Goods Expenditure 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Available Expenditure (£m)	Blackwater	7.63	8.75	10.07	12.21	14.81	17.97
Hart	Fleet	63.40	74.10	85.51	103.48	125.24	152.24
	Hook	3.15	3.71	4.38	5.48	6.82	8.58
	Yateley	3.31	3.75	4.27	5.13	6.17	7.43
	Hartley Wintney	1.65	1.94	2.28	2.82	3.49	4.36
	Odiham	1.27	1.50	1.77	2.21	2.76	3.48
	Other Hart	0.15	0.17	0.20	0.25	0.30	0.36
	Hart Sub Total	**80.57**	**93.92**	**108.48**	**131.58**	**159.59**	**194.43**
Turnover of Existing Floorspace (£m)	Blackwater	7.63	8.43	9.30	10.52	11.91	13.47
Hart	Fleet	63.40	69.98	77.24	87.40	98.88	111.87
	Hook	3.15	5.62	6.20	7.02	7.94	8.98
	Yateley	3.31	3.65	4.03	4.56	5.16	5.84
	Hartley Wintney	1.65	1.82	2.01	2.27	2.57	2.91
	Odiham	1.27	1.40	1.55	1.75	1.98	2.24
	Other Hart	0.15	0.17	0.19	0.21	0.24	0.27
	Hart Sub Total	**80.57**	**91.07**	**100.52**	**113.73**	**128.68**	**145.59**
Surplus/Deficit Expenditure (£m)	Blackwater	n/a	0.33	0.77	1.69	2.90	4.50
Hart	Fleet	n/a	4.12	8.27	16.08	26.36	40.37
	Hook	n/a	-1.90	-1.82	-1.54	-1.11	-0.40
	Yateley	n/a	0.09	0.24	0.57	1.01	1.59
	Hartley Wintney	n/a	0.12	0.27	0.55	0.92	1.45
	Odiham	n/a	0.10	0.22	0.46	0.78	1.24
	Other Hart	n/a	0.01	0.01	0.03	0.06	0.09
	Hart Sub Total	**n/a**	**2.86**	**7.96**	**17.85**	**30.92**	**48.84**

Note: Commitments added at 2018

Table 16A: Rushmoor Comparison Goods Floorspace Capacity 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£5,000	£5,519	£6,092	£6,893	£7,798	£8,823
Floorspace Projection (sq.m net)	Farnborough (incl. Retail Warehousing)	n/a	-3,965	-738	4,912	10,928	17,353
Rushmoor	Aldershot	n/a	746	660	2,080	3,601	5,219
	North Camp	n/a	34	77	154	236	322
	Other Rushmoor	n/a	1	3	5	8	11
	Rushmoor Sub Total	**n/a**	**-3,184**	**2**	**7,151**	**14,773**	**22,905**
Floorspace Projection (sq.m gross)	Farnborough (incl. Retail Warehousing)	n/a	-5,664	-1,054	7,017	15,612	24,790
Rushmoor	Aldershot	n/a	1,066	943	2,972	5,144	7,456
	North Camp	n/a	48	110	220	337	460
	Other Rushmoor	n/a	2	4	7	12	16
	Rushmoor Sub Total	**n/a**	**-4,548**	**3**	**10,216**	**21,104**	**32,722**

Table 16B: Hart Comparison Goods Floorspace Capacity 2014 to 2037 – Adjusted to SHMA Population Projections

	Centre	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)		£5,000	£5,519	£6,092	£6,893	£7,798	£8,823
Floorspace Projection (sq.m net)	Blackwater	n/a	59	126	245	372	510
Hart	Fleet	n/a	746	1,357	2,333	3,380	4,575
	Hook	n/a	-345	-298	-223	-143	-45
	Yateley	n/a	17	40	83	129	181
	Hartley Wintney	n/a	21	44	79	118	164
	Odiham	n/a	17	37	67	100	140
	Other Hart	n/a	1	2	5	7	10
	Hart Sub Total	**n/a**	**518**	**1,307**	**2,590**	**3,964**	**5,536**
Floorspace Projection (sq.m gross)	Blackwater	n/a	85	180	350	532	729
Hart	Fleet	n/a	1,066	1,939	3,333	4,829	6,536
	Hook	n/a	-493	-426	-319	-204	-65
	Yateley	n/a	24	56	118	185	258
	Hartley Wintney	n/a	31	62	114	168	235
	Odiham	n/a	25	52	96	143	201
	Other Hart	n/a	1	3	7	11	14
	Hart Sub Total	**n/a**	**739**	**1,867**	**3,699**	**5,663**	**7,908**

Appendix 4 Cinema Capacity

Table 1: Study Area Population

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,166	57,107	58,107	59,283	60,400	61,635
Zone 2 - Aldershot	37,843	38,529	39,174	39,860	40,667	41,434	42,281
Zone 3 - Guildford (Rural West)	34,670	35,874	37,079	38,077	39,253	40,307	41,200
Zone 4 - Farnham	38,678	39,335	40,417	41,541	42,794	43,892	44,842
Zone 5 - Camberley	39,951	40,368	41,017	41,759	42,593	43,427	44,261
Zone 6 - Fleet	31,789	32,488	33,151	33,815	34,514	35,108	35,667
Zone 7 - Yateley	33,518	34,255	34,954	35,654	36,391	37,017	37,606
Zone 8 - Hart (Rural West)	27,958	28,621	29,281	29,932	30,618	31,200	31,742
Zone 9 - Sandhurst	27,298	28,216	29,281	30,308	31,363	32,289	33,149
Total	**326,871**	**333,852**	**341,462**	**349,053**	**357,475**	**365,073**	**372,383**

Sources: Experian MMG3 2011 Census Population and SNPP 2012 based projections

Table 2: Total Number of Cinema Trips (per annum)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	157,264	159,899	162,699	165,992	169,121	172,579
Zone 2 - Aldershot	107,881	109,688	111,609	113,868	116,014	118,386
Zone 3 - Guildford (Rural West)	100,449	103,820	106,615	109,907	112,860	115,359
Zone 4 - Farnham	110,138	113,168	116,316	119,822	122,897	125,557
Zone 5 - Camberley	113,031	114,848	116,924	119,260	121,596	123,932
Zone 6 - Fleet	90,965	92,824	94,682	96,639	98,301	99,866
Zone 7 - Yateley	95,913	97,873	99,832	101,895	103,648	105,298
Zone 8 - Hart (Rural West)	80,139	81,988	83,809	85,730	87,359	88,878
Zone 9 - Sandhurst	79,006	81,986	84,863	87,818	90,408	92,816
Total	**934,785**	**956,093**	**977,347**	**1,000,930**	**1,022,204**	**1,042,672**

Sources:
Table 1
Assumes 2.8 cinema trips per person per annum (NLP CineScope)

Table 3: Base Year 2014 Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
Aldershot	26.7%	84.2%	28.1%	58.9%	3.3%	55.4%	18.6%	5.6%	9.0%	10.0%
Camberley	54.2%	4.0%	48.5%	14.3%	87.3%	13.6%	66.8%	9.2%	78.9%	n/a
Basingstoke	4.5%	0.0%	1.0%	9.1%	0.8%	24.0%	6.3%	77.2%	0.0%	n/a
Guildford	0.0%	6.1%	9.4%	13.0%	0.0%	0.0%	2.2%	0.0%	0.0%	n/a
Woking	3.2%	0.0%	9.8%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Other	11.4%	5.7%	3.2%	3.6%	8.6%	7.0%	6.1%	8.0%	12.1%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey September 2014

Table 4: Base Year 2014 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2014	**157,264**	**107,881**	**100,449**	**110,138**	**113,031**	**90,965**	**95,913**	**80,139**	**79,006**		**934,785**
Aldershot	41,990	90,836	28,226	64,871	3,730	50,395	17,840	4,488	7,111	34,387	343,873
Camberley	85,237	4,315	48,718	15,750	98,676	12,371	64,070	7,373	62,336	n/a	398,845
Basingstoke	7,077	0	1,004	10,023	904	21,832	6,043	61,867	0	n/a	108,750
Guildford	0	6,581	9,442	14,318	0	0	2,110	0	0	n/a	32,451
Woking	5,032	0	9,844	1,212	0	0	0	0	0	n/a	16,088
Other	17,928	6,149	3,214	3,965	9,721	6,368	5,851	6,411	9,560	n/a	69,166
Total	**157,264**	**107,881**	**100,449**	**110,138**	**113,031**	**90,965**	**95,913**	**80,139**	**79,006**	**n/a**	**969,172**

Source: Tables 2 and 3

Table 5: Future Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
Aldershot (existing)	20.0%	75.0%	25.0%	55.0%	3.0%	45.0%	10.0%	5.0%	5.0%	10.0%
Farnborough (potential)	40.0%	20.0%	25.0%	10.0%	15.0%	10.0%	25.0%	5.0%	10.0%	10.0%
Hart (potential)	3.0%	1.0%	1.0%	4.0%	1.0%	32.0%	9.0%	11.0%	1.0%	10.0%
Other	37.0%	4.0%	49.0%	31.0%	81.0%	13.0%	56.0%	79.0%	84.0%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey September 2014 and NLP assumptions

Note: Potential share for Hart based on comparison goods market shares

Table 6: 2018 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2018	**159,899**	**109,688**	**103,820**	**113,168**	**114,848**	**92,824**	**97,873**	**81,988**	**81,986**		**956,093**
Aldershot (existing)	31,980	82,266	25,955	62,242	3,445	41,771	9,787	4,099	4,099	29,516	295,162
Farnborough (potential)	63,960	21,938	25,955	11,317	17,227	9,282	24,468	4,099	8,199	20,716	207,161
Hart (potential)	4,797	1,097	1,038	4,527	1,148	29,704	8,809	9,019	820	6,773	67,731
Other	59,163	4,388	50,872	35,082	93,027	12,067	54,809	64,770	68,868	n/a	443,045
Total	**159,899**	**109,688**	**103,820**	**113,168**	**114,848**	**92,824**	**97,873**	**81,988**	**81,986**	**n/a**	**1,013,099**

Source: Tables 2 and 5

Table 7: 2022 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2022	**162,699**	**111,609**	**106,615**	**116,316**	**116,924**	**94,682**	**99,832**	**83,809**	**84,863**		**977,347**
Aldershot (existing)	32,540	83,706	26,654	63,974	3,508	42,607	9,983	4,190	4,243	30,156	301,561
Farnborough (potential	65,079	22,322	26,654	11,632	17,539	9,468	24,958	4,190	8,486	21,148	211,476
Hart (potential)	4,881	1,116	1,066	4,653	1,169	30,298	8,985	9,219	849	6,915	69,151
Other	60,198	4,464	52,241	36,058	94,708	12,309	55,906	66,209	71,285	n/a	453,378
Total	**162,699**	**111,609**	**106,615**	**116,316**	**116,924**	**94,682**	**99,832**	**83,809**	**84,863**	**n/a**	**1,035,566**

Source: Tables 2 and 5

Table 8: 2027 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2027	**165,992**	**113,868**	**109,907**	**119,822**	**119,260**	**96,639**	**101,895**	**85,730**	**87,818**		**1,000,930**
Aldershot (existing)	33,198	85,401	27,477	65,902	3,578	43,487	10,189	4,287	4,391	30,879	308,789
Farnborough (potentia	66,397	22,774	27,477	11,982	17,889	9,664	25,474	4,287	8,782	21,636	216,360
Hart (potential)	4,980	1,139	1,099	4,793	1,193	30,924	9,171	9,430	878	7,067	70,674
Other	61,417	4,555	53,854	37,145	96,600	12,563	57,061	67,727	73,767	n/a	464,689
Total	**165,992**	**113,868**	**109,907**	**119,822**	**119,260**	**96,639**	**101,895**	**85,730**	**87,818**	**n/a**	**1,060,512**

Source: Tables 2 and 5

Table 9: 2032 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2032	**169,121**	**116,014**	**112,860**	**122,897**	**121,596**	**98,301**	**103,648**	**87,359**	**90,408**		**1,022,204**
Aldershot (existing)	33,824	87,011	28,215	67,593	3,648	44,236	10,365	4,368	4,520	31,531	315,311
Farnborough (potential	67,648	23,203	28,215	12,290	18,239	9,830	25,912	4,368	9,041	22,083	220,829
Hart (potential)	5,074	1,160	1,129	4,916	1,216	31,456	9,328	9,609	904	7,199	71,992
Other	62,575	4,641	55,301	38,098	98,492	12,779	58,043	69,014	75,943	n/a	474,885
Total	**169,121**	**116,014**	**112,860**	**122,897**	**121,596**	**98,301**	**103,648**	**87,359**	**90,408**	**n/a**	**1,083,017**

Source: Tables 2 and 5

Table 10: 2037 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Trips 2037	**172,579**	**118,386**	**115,359**	**125,557**	**123,932**	**99,866**	**105,298**	**88,878**	**92,816**		**1,042,672**
Aldershot (existing)	34,516	88,790	28,840	69,056	3,718	44,940	10,530	4,444	4,641	32,164	321,638
Farnborough (potential	69,032	23,677	28,840	12,556	18,590	9,987	26,325	4,444	9,282	22,526	225,256
Hart (potential)	5,177	1,184	1,154	5,022	1,239	31,957	9,477	9,777	928	7,324	73,239
Other	63,854	4,735	56,526	38,923	100,385	12,983	58,967	70,213	77,965	n/a	484,551
Total	**172,579**	**118,386**	**115,359**	**125,557**	**123,932**	**99,866**	**105,298**	**88,878**	**92,816**	**n/a**	**1,104,685**

Source: Tables 2 and 5

Table 10: Cinema Screen Capacity 2014 to 2037

	2014	2018	2022	2027	2032	2037
Total Cinema Trips attracted to Rushmoor (per annum)	343,873	502,323	513,037	525,149	536,140	546,894
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	7	11	11	11	11	12
Existing and Proposed Screens in Rushmoor	7	14	14	14	14	14
Rushmoor Screen Capacity	0	-3	-3	-3	-3	-2
Potential Cinema Trips attracted to Hart (per annum)	n/a	67,731	69,151	70,674	71,992	73,239
Number of Trips per Screen (per annum)	n/a	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	n/a	1	1	2	2	2

Table 11: Cinema Seat Capacity 2014 to 2037

	2014	2018	2022	2027	2032	2037
Total Cinema Trips attracted to Rushmoor (per annum)	343,873	502,323	513,037	525,149	536,140	546,894
Number of Trips per Seat (per annum)	232	232	232	232	232	232
Cinema Seat Potential	1,482	2,165	2,211	2,264	2,311	2,357
Existing and Proposed Seats in Rushmoor	1,145	2,044	2,044	2,044	2,044	2,044
Rushmoor Seat Capacity	337	121	167	220	267	313
Potential Cinema Trips attracted to Hart (per annum)	n/a	67,731	69,151	70,674	71,992	73,239
Number of Trips per Seat (per annum)	n/a	232	232	232	232	232
Cinema Seat Potential	n/a	292	298	305	310	316

Table 12: Revised Study Area Population – Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment Projections

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,219	57,623	59,027	60,782	62,537	64,292
Zone 2 - Aldershot	37,843	39,664	42,092	44,520	47,555	50,590	53,625
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,283	40,328	41,476	42,798	43,979	45,061
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	33,400	35,548	36,553	37,333	38,113	39,108
Zone 7 - Yateley	33,518	33,809	34,197	34,480	34,790	35,100	35,500
Zone 8 - Hart (Rural West)	27,958	29,358	31,213	32,893	34,901	36,888	39,373
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**337,027**	**350,274**	**361,891**	**375,432**	**388,499**	**402,006**

Source: Experian MMG3 2011 Census Population, Hart, Rushmoor and Surrey Heath SHMA (Midpoint Employment Growth Scenario) and SNPP 2012 based projections for other LPA areas

Note: Population growth within Rushmoor and Hart redistributed

Table 13: Cinema Screen Capacity 2014 to 2037 – SHMA Population

	2014	2018	2022	2027	2032	2037
Total Cinema Trips attracted to Rushmoor (per annum)	348,426	516,867	534,582	555,427	575,702	596,097
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	7	11	11	12	12	13
Existing and Proposed Screens in Rushmoor	7	14	14	14	14	14
Rushmoor Screen Capacity	0	-3	-3	-2	-2	-1
Potential Cinema Trips attracted to Hart (per annum)	n/a	70,753	72,871	74,979	77,053	79,515
Number of Trips per Screen (per annum)	n/a	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	n/a	2	2	2	2	2

Table 14: Cinema Seat Capacity 2014 to 2037 – SHMA Population

	2014	2018	2022	2027	2032	2037
Total Cinema Trips attracted to Rushmoor (per annum)	348,426	516,867	534,582	555,427	575,702	596,097
Number of Trips per Seat (per annum)	232	232	232	232	232	232
Cinema Seat Potential	1,502	2,228	2,304	2,394	2,481	2,569
Existing and Proposed Seats in Rushmoor	1,145	2,044	2,044	2,044	2,044	2,044
Rushmoor Seat Capacity	357	184	260	350	437	525
Potential Cinema Trips attracted to Hart (per annum)	n/a	70,753	72,871	74,979	77,053	79,515
Number of Trips per Seat (per annum)	n/a	232	232	232	232	232
Cinema Seat Potential	n/a	305	314	323	332	343

Appendix 5 Food & Beverage Capacity

Table 1: Study Area Population

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,166	57,107	58,107	59,283	60,400	61,635
Zone 2 - Aldershot	37,843	38,529	39,174	39,860	40,667	41,434	42,281
Zone 3 - Guildford (Rural West)	34,670	35,874	37,079	38,077	39,253	40,307	41,200
Zone 4 - Farnham	38,678	39,335	40,417	41,541	42,794	43,892	44,842
Zone 5 - Camberley	39,951	40,368	41,017	41,759	42,593	43,427	44,261
Zone 6 - Fleet	31,789	32,488	33,151	33,815	34,514	35,108	35,667
Zone 7 - Yateley	33,518	34,255	34,954	35,654	36,391	37,017	37,606
Zone 8 - Hart (Rural West)	27,958	28,621	29,281	29,932	30,618	31,200	31,742
Zone 9 - Sandhurst	27,298	28,216	29,281	30,308	31,363	32,289	33,149
Total	**326,871**	**333,852**	**341,462**	**349,053**	**357,475**	**365,073**	**372,383**

Source: Experian MMG3 2011 Census Population and SNPP 2012 based projections

Table 2: Food & Beverage Expenditure per person (£)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	1,030	1,101	1,159	1,237	1,319	1,407
Zone 2 - Aldershot	946	1,011	1,065	1,136	1,212	1,293
Zone 3 - Guildford (Rural West)	1,179	1,260	1,327	1,416	1,510	1,611
Zone 4 - Farnham	1,335	1,427	1,503	1,603	1,710	1,824
Zone 5 - Camberley	1,397	1,493	1,572	1,677	1,788	1,908
Zone 6 - Fleet	1,358	1,451	1,528	1,630	1,739	1,855
Zone 7 - Yateley	1,266	1,353	1,425	1,520	1,621	1,729
Zone 8 - Hart (Rural West)	1,364	1,458	1,535	1,637	1,747	1,863
Zone 9 - Sandhurst	1,215	1,298	1,367	1,458	1,556	1,659

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 2.1% 2013-2014, 2.8% 2014-2015 and 1.3% from 2015

Table 3: Total Food & Beverage Expenditure (£m)

Zone	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	57.86	62.87	67.36	73.31	79.67	86.73
Zone 2 - Aldershot	36.47	39.62	42.45	46.20	50.21	54.66
Zone 3 - Guildford (Rural West)	42.31	46.73	50.53	55.56	60.86	66.36
Zone 4 - Farnham	52.53	57.68	62.43	68.60	75.05	81.79
Zone 5 - Camberley	56.38	61.22	65.63	71.41	77.67	84.44
Zone 6 - Fleet	44.12	48.11	51.67	56.26	61.04	66.15
Zone 7 - Yateley	43.37	47.29	50.79	55.30	60.01	65.03
Zone 8 - Hart (Rural West)	39.04	42.68	45.94	50.13	54.49	59.14
Zone 9 - Sandhurst	34.28	38.02	41.44	45.74	50.23	55.01
Total	**406.35**	**444.21**	**478.25**	**522.51**	**569.24**	**619.30**

Source: Tables 1 and 2

Table 4: Base Year 2014 Food & Beverage Market Shares (%)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	% Inflow
Farnborough	27.4%	7.5%	1.7%	1.1%	3.1%	2.9%	3.0%	1.5%	2.2%	10.0%
Aldershot	8.0%	56.1%	9.3%	6.5%	1.7%	8.9%	2.8%	0.0%	0.0%	10.0%
North Camp	4.6%	0.3%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.0%
Other Rushmoor	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	1.6%	5.0%
Rushmoor Borough Sub Total	**40.6%**	**63.9%**	**16.2%**	**7.6%**	**4.8%**	**11.8%**	**6.9%**	**1.5%**	**4.4%**	
Blackwater	1.5%	0.0%	0.0%	0.0%	1.0%	0.0%	3.9%	0.7%	0.0%	5.0%
Fleet	8.3%	7.3%	2.4%	4.6%	0.0%	63.5%	26.3%	11.2%	0.8%	5.0%
Hook	0.0%	0.0%	0.4%	1.0%	0.6%	1.1%	0.7%	6.4%	0.0%	5.0%
Yateley	0.6%	0.0%	0.0%	0.0%	0.6%	0.0%	17.5%	1.6%	2.6%	5.0%
Hartley Wintney	0.4%	0.0%	0.8%	0.0%	1.8%	2.6%	1.7%	23.4%	0.0%	5.0%
Odiham	0.6%	0.0%	0.0%	2.4%	0.0%	2.1%	1.1%	23.2%	0.0%	5.0%
Other Hart	1.1%	0.0%	0.4%	2.9%	0.4%	3.7%	1.0%	2.9%	0.0%	5.0%
Hart District Sub Total	**12.5%**	**7.3%**	**4.0%**	**10.9%**	**4.4%**	**73.0%**	**52.2%**	**69.4%**	**3.4%**	
Basingstoke	1.1%	0.4%	0.0%	1.9%	0.4%	0.7%	0.9%	16.4%	0.0%	n/a
Camberley	19.4%	1.9%	23.9%	0.0%	51.7%	1.6%	26.2%	0.9%	50.1%	n/a
Farnham	5.0%	12.5%	2.6%	66.7%	0.4%	4.3%	1.7%	0.7%	2.4%	n/a
Guildford	4.6%	5.7%	11.4%	2.1%	1.3%	0.4%	0.4%	0.9%	1.2%	n/a
Woking	0.2%	0.5%	5.3%	0.0%	1.5%	0.0%	0.0%	0.0%	1.1%	n/a
Other	16.6%	7.8%	36.6%	10.8%	35.5%	8.2%	11.7%	10.2%	37.4%	n/a
Other Sub Total	**46.9%**	**28.8%**	**79.8%**	**81.5%**	**90.8%**	**15.2%**	**40.9%**	**29.1%**	**92.2%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2014

Table 5: Base Year 2014 Food & Beverage Expenditure (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2014	**57.86**	**36.47**	**42.31**	**52.53**	**56.38**	**44.12**	**43.37**	**39.04**	**34.28**		**406.35**
Farnborough	15.85	2.73	0.72	0.58	1.75	1.28	1.30	0.59	0.75	2.84	28.39
Aldershot	4.63	20.46	3.93	3.41	0.96	3.93	1.21	0.00	0.00	4.28	42.82
North Camp	2.66	0.11	2.20	0.00	0.00	0.00	0.00	0.00	0.21	0.27	5.45
Other Rushmoor	0.35	0.00	0.00	0.00	0.00	0.00	0.48	0.00	0.55	0.07	1.44
Rushmoor Borough Sub Total	**23.49**	**23.30**	**6.85**	**3.99**	**2.71**	**5.21**	**2.99**	**0.59**	**1.51**	**7.47**	**78.10**
Blackwater	0.87	0.00	0.00	0.00	0.56	0.00	1.69	0.27	0.00	0.18	3.58
Fleet	4.80	2.66	1.02	2.42	0.00	28.01	11.41	4.37	0.27	2.89	57.86
Hook	0.00	0.00	0.17	0.53	0.34	0.49	0.30	2.50	0.00	0.23	4.55
Yateley	0.35	0.00	0.00	0.00	0.34	0.00	7.59	0.62	0.89	0.52	10.31
Hartley Wintney	0.23	0.00	0.34	0.00	1.01	1.15	0.74	9.14	0.00	0.66	13.27
Odiham	0.35	0.00	0.00	1.26	0.00	0.93	0.48	9.06	0.00	0.64	12.70
Other Hart	0.64	0.00	0.17	1.52	0.23	1.63	0.43	1.13	0.00	0.30	6.06
Hart District Sub Total	**7.23**	**2.66**	**1.69**	**5.73**	**2.48**	**32.20**	**22.64**	**27.09**	**1.17**	**5.42**	**108.31**
Basingstoke	0.64	0.15	0.00	1.00	0.23	0.31	0.39	6.40	0.00	n/a	9.11
Camberley	11.23	0.69	10.11	0.00	29.15	0.71	11.36	0.35	17.18	n/a	80.77
Farnham	2.89	4.56	1.10	35.04	0.23	1.90	0.74	0.27	0.82	n/a	47.54
Guildford	2.66	2.08	4.82	1.10	0.73	0.18	0.17	0.35	0.41	n/a	12.51
Woking	0.12	0.18	2.24	0.00	0.85	0.00	0.00	0.00	0.38	n/a	3.76
Other	9.60	2.84	15.48	5.67	20.02	3.62	5.07	3.98	12.82	n/a	79.12
Other Sub Total	**27.14**	**10.50**	**33.76**	**42.81**	**51.20**	**6.71**	**17.74**	**11.36**	**31.61**		**232.82**
TOTAL	**57.86**	**36.47**	**42.31**	**52.53**	**56.38**	**44.12**	**43.37**	**39.04**	**34.28**		**419.23**

Source: Tables 3 and 4

Table 6: Food & Beverage Expenditure 2018 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2018	**62.87**	**39.62**	**46.73**	**57.68**	**61.22**	**48.11**	**47.29**	**42.68**	**38.02**		**444.21**
Farnborough	17.23	2.97	0.79	0.63	1.90	1.40	1.42	0.64	0.84	3.09	30.90
Aldershot	5.03	22.23	4.35	3.75	1.04	4.28	1.32	0.00	0.00	4.67	46.66
North Camp	2.89	0.12	2.43	0.00	0.00	0.00	0.00	0.00	0.23	0.30	5.97
Other Rushmoor	0.38	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.61	0.08	1.58
Rushmoor Borough Sub Total	**25.52**	**25.32**	**7.57**	**4.38**	**2.94**	**5.68**	**3.26**	**0.64**	**1.67**	**8.13**	**85.12**
Blackwater	0.94	0.00	0.00	0.00	0.61	0.00	1.84	0.30	0.00	0.19	3.89
Fleet	5.22	2.89	1.12	2.65	0.00	30.55	12.44	4.78	0.30	3.16	63.11
Hook	0.00	0.00	0.19	0.58	0.37	0.53	0.33	2.73	0.00	0.25	4.97
Yateley	0.38	0.00	0.00	0.00	0.37	0.00	8.28	0.68	0.99	0.56	11.25
Hartley Wintney	0.25	0.00	0.37	0.00	1.10	1.25	0.80	9.99	0.00	0.72	14.49
Odiham	0.38	0.00	0.00	1.38	0.00	1.01	0.52	9.90	0.00	0.69	13.89
Other Hart	0.69	0.00	0.19	1.67	0.24	1.78	0.47	1.24	0.00	0.33	6.62
Hart District Sub Total	**7.86**	**2.89**	**1.87**	**6.29**	**2.69**	**35.12**	**24.69**	**29.62**	**1.29**	**5.91**	**118.23**
Basingstoke	0.69	0.16	0.00	1.10	0.24	0.34	0.43	7.00	0.00	n/a	9.95
Camberley	12.20	0.75	11.17	0.00	31.65	0.77	12.39	0.38	19.05	n/a	88.36
Farnham	3.14	4.95	1.21	38.47	0.24	2.07	0.80	0.30	0.91	n/a	52.11
Guildford	2.89	2.26	5.33	1.21	0.80	0.19	0.19	0.38	0.46	n/a	13.71
Woking	0.13	0.20	2.48	0.00	0.92	0.00	0.00	0.00	0.42	n/a	4.14
Other	10.44	3.09	17.10	6.23	21.73	3.94	5.53	4.35	14.22	n/a	86.64
Other Sub Total	**29.48**	**11.41**	**37.29**	**47.01**	**55.59**	**7.31**	**19.34**	**12.42**	**35.05**		**254.91**
TOTAL	**62.87**	**39.62**	**46.73**	**57.68**	**61.22**	**48.11**	**47.29**	**42.68**	**38.02**		**458.26**

Source: Tables 3 and 4

Table 7: Food & Beverage Expenditure 2022 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2022	**67.36**	**42.45**	**50.53**	**62.43**	**65.63**	**51.67**	**50.79**	**45.94**	**41.44**		**478.25**
Farnborough	18.46	3.18	0.86	0.69	2.03	1.50	1.52	0.69	0.91	3.32	33.16
Aldershot	5.39	23.82	4.70	4.06	1.12	4.60	1.42	0.00	0.00	5.01	50.11
North Camp	3.10	0.13	2.63	0.00	0.00	0.00	0.00	0.00	0.25	0.32	6.42
Other Rushmoor	0.40	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.66	0.09	1.71
Rushmoor Borough Sub Total	**27.35**	**27.13**	**8.19**	**4.74**	**3.15**	**6.10**	**3.50**	**0.69**	**1.82**	**8.73**	**91.40**
Blackwater	1.01	0.00	0.00	0.00	0.66	0.00	1.98	0.32	0.00	0.21	4.18
Fleet	5.59	3.10	1.21	2.87	0.00	32.81	13.36	5.15	0.33	3.39	67.81
Hook	0.00	0.00	0.20	0.62	0.39	0.57	0.36	2.94	0.00	0.27	5.35
Yateley	0.40	0.00	0.00	0.00	0.39	0.00	8.89	0.74	1.08	0.61	12.10
Hartley Wintney	0.27	0.00	0.40	0.00	1.18	1.34	0.86	10.75	0.00	0.78	15.59
Odiham	0.40	0.00	0.00	1.50	0.00	1.09	0.56	10.66	0.00	0.75	14.95
Other Hart	0.74	0.00	0.20	1.81	0.26	1.91	0.51	1.33	0.00	0.36	7.12
Hart District Sub Total	**8.42**	**3.10**	**2.02**	**6.80**	**2.89**	**37.72**	**26.51**	**31.88**	**1.41**	**6.36**	**127.12**
Basingstoke	0.74	0.17	0.00	1.19	0.26	0.36	0.46	7.53	0.00	n/a	10.71
Camberley	13.07	0.81	12.08	0.00	33.93	0.83	13.31	0.41	20.76	n/a	95.19
Farnham	3.37	5.31	1.31	41.64	0.26	2.22	0.86	0.32	0.99	n/a	56.29
Guildford	3.10	2.42	5.76	1.31	0.85	0.21	0.20	0.41	0.50	n/a	14.76
Woking	0.13	0.21	2.68	0.00	0.98	0.00	0.00	0.00	0.46	n/a	4.47
Other	11.18	3.31	18.49	6.74	23.30	4.24	5.94	4.69	15.50	n/a	93.39
Other Sub Total	**31.59**	**12.23**	**40.32**	**50.88**	**59.59**	**7.85**	**20.78**	**13.37**	**38.21**		**274.81**
TOTAL	**67.36**	**42.45**	**50.53**	**62.43**	**65.63**	**51.67**	**50.79**	**45.94**	**41.44**		**493.34**

Source: Tables 3 and 4

Table 8: Food & Beverage Expenditure 2027 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2027	**73.31**	**46.20**	**55.56**	**68.60**	**71.41**	**56.26**	**55.30**	**50.13**	**45.74**		**522.51**
Farnborough	20.09	3.47	0.94	0.75	2.21	1.63	1.66	0.75	1.01	3.61	36.13
Aldershot	5.86	25.92	5.17	4.46	1.21	5.01	1.55	0.00	0.00	5.46	54.64
North Camp	3.37	0.14	2.89	0.00	0.00	0.00	0.00	0.00	0.27	0.35	7.03
Other Rushmoor	0.44	0.00	0.00	0.00	0.00	0.00	0.61	0.00	0.73	0.09	1.87
Rushmoor Borough Sub Total	**29.76**	**29.52**	**9.00**	**5.21**	**3.43**	**6.64**	**3.82**	**0.75**	**2.01**	**9.52**	**99.67**
Blackwater	1.10	0.00	0.00	0.00	0.71	0.00	2.16	0.35	0.00	0.23	4.55
Fleet	6.08	3.37	1.33	3.16	0.00	35.72	14.54	5.61	0.37	3.69	73.89
Hook	0.00	0.00	0.22	0.69	0.43	0.62	0.39	3.21	0.00	0.29	5.84
Yateley	0.44	0.00	0.00	0.00	0.43	0.00	9.68	0.80	1.19	0.66	13.20
Hartley Wintney	0.29	0.00	0.44	0.00	1.29	1.46	0.94	11.73	0.00	0.85	17.01
Odiham	0.44	0.00	0.00	1.65	0.00	1.18	0.61	11.63	0.00	0.82	16.32
Other Hart	0.81	0.00	0.22	1.99	0.29	2.08	0.55	1.45	0.00	0.39	7.78
Hart District Sub Total	**9.16**	**3.37**	**2.22**	**7.48**	**3.14**	**41.07**	**28.87**	**34.79**	**1.56**	**6.93**	**138.59**
Basingstoke	0.81	0.18	0.00	1.30	0.29	0.39	0.50	8.22	0.00	n/a	11.69
Camberley	14.22	0.88	13.28	0.00	36.92	0.90	14.49	0.45	22.92	n/a	104.05
Farnham	3.67	5.78	1.44	45.76	0.29	2.42	0.94	0.35	1.10	n/a	61.73
Guildford	3.37	2.63	6.33	1.44	0.93	0.23	0.22	0.45	0.55	n/a	16.15
Woking	0.15	0.23	2.94	0.00	1.07	0.00	0.00	0.00	0.50	n/a	4.90
Other	12.17	3.60	20.34	7.41	25.35	4.61	6.47	5.11	17.11	n/a	102.17
Other Sub Total	**34.38**	**13.31**	**44.34**	**55.91**	**64.84**	**8.55**	**22.62**	**14.59**	**42.17**		**300.71**
TOTAL	**73.31**	**46.20**	**55.56**	**68.60**	**71.41**	**56.26**	**55.30**	**50.13**	**45.74**		**538.96**

Source: Tables 3 and 4

Table 9: Food & Beverage Expenditure 2032 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2032	**79.67**	**50.21**	**60.86**	**75.05**	**77.67**	**61.04**	**60.01**	**54.49**	**50.23**		**569.24**
Farnborough	21.83	3.77	1.03	0.83	2.41	1.77	1.80	0.82	1.11	3.93	39.29
Aldershot	6.37	28.17	5.66	4.88	1.32	5.43	1.68	0.00	0.00	5.95	59.46
North Camp	3.66	0.15	3.16	0.00	0.00	0.00	0.00	0.00	0.30	0.38	7.67
Other Rushmoor	0.48	0.00	0.00	0.00	0.00	0.00	0.66	0.00	0.80	0.10	2.04
Rushmoor Borough Sub Total	**32.35**	**32.09**	**9.86**	**5.70**	**3.73**	**7.20**	**4.14**	**0.82**	**2.21**	**10.36**	**108.46**
Blackwater	1.20	0.00	0.00	0.00	0.78	0.00	2.34	0.38	0.00	0.25	4.94
Fleet	6.61	3.67	1.46	3.45	0.00	38.76	15.78	6.10	0.40	4.01	80.25
Hook	0.00	0.00	0.24	0.75	0.47	0.67	0.42	3.49	0.00	0.32	6.36
Yateley	0.48	0.00	0.00	0.00	0.47	0.00	10.50	0.87	1.31	0.72	14.34
Hartley Wintney	0.32	0.00	0.49	0.00	1.40	1.59	1.02	12.75	0.00	0.92	18.49
Odiham	0.48	0.00	0.00	1.80	0.00	1.28	0.66	12.64	0.00	0.89	17.75
Other Hart	0.88	0.00	0.24	2.18	0.31	2.26	0.60	1.58	0.00	0.42	8.47
Hart District Sub Total	**9.96**	**3.67**	**2.43**	**8.18**	**3.42**	**44.56**	**31.32**	**37.82**	**1.71**	**7.53**	**150.60**
Basingstoke	0.88	0.20	0.00	1.43	0.31	0.43	0.54	8.94	0.00	n/a	12.72
Camberley	15.46	0.95	14.55	0.00	40.15	0.98	15.72	0.49	25.17	n/a	113.46
Farnham	3.98	6.28	1.58	50.06	0.31	2.62	1.02	0.38	1.21	n/a	67.45
Guildford	3.66	2.86	6.94	1.58	1.01	0.24	0.24	0.49	0.60	n/a	17.63
Woking	0.16	0.25	3.23	0.00	1.16	0.00	0.00	0.00	0.55	n/a	5.35
Other	13.23	3.92	22.28	8.11	27.57	5.01	7.02	5.56	18.79	n/a	111.47
Other Sub Total	**37.37**	**14.46**	**48.57**	**61.17**	**70.52**	**9.28**	**24.54**	**15.86**	**46.31**		**328.08**
TOTAL	**79.67**	**50.21**	**60.86**	**75.05**	**77.67**	**61.04**	**60.01**	**54.49**	**50.23**		**587.13**

Source: Tables 3 and 4

Table 10: Food & Beverage Expenditure 2037 (£m)

Centre	Zone 1 Farnborough	Zone 2 Aldershot	Zone 3 Guildford (Rural West)	Zone 4 Farnham	Zone 5 Camberley	Zone 6 Fleet	Zone 7 Yateley	Zone 8 Hart (Rural West)	Zone 9 Sandhurst	Inflow	Total
Expenditure 2037	**86.73**	**54.66**	**66.36**	**81.79**	**84.44**	**66.15**	**65.03**	**59.14**	**55.01**		**619.30**
Farnborough	23.76	4.10	1.13	0.90	2.62	1.92	1.95	0.89	1.21	4.27	42.75
Aldershot	6.94	30.66	6.17	5.32	1.44	5.89	1.82	0.00	0.00	6.47	64.70
North Camp	3.99	0.16	3.45	0.00	0.00	0.00	0.00	0.00	0.33	0.42	8.35
Other Rushmoor	0.52	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.88	0.11	2.23
Rushmoor Borough Sub Total	**35.21**	**34.93**	**10.75**	**6.22**	**4.05**	**7.81**	**4.49**	**0.89**	**2.42**	**11.27**	**118.03**
Blackwater	1.30	0.00	0.00	0.00	0.84	0.00	2.54	0.41	0.00	0.27	5.36
Fleet	7.20	3.99	1.59	3.76	0.00	42.01	17.10	6.62	0.44	4.35	87.07
Hook	0.00	0.00	0.27	0.82	0.51	0.73	0.46	3.78	0.00	0.35	6.90
Yateley	0.52	0.00	0.00	0.00	0.51	0.00	11.38	0.95	1.43	0.78	15.56
Hartley Wintney	0.35	0.00	0.53	0.00	1.52	1.72	1.11	13.84	0.00	1.00	20.06
Odiham	0.52	0.00	0.00	1.96	0.00	1.39	0.72	13.72	0.00	0.96	19.27
Other Hart	0.95	0.00	0.27	2.37	0.34	2.45	0.65	1.72	0.00	0.46	9.20
Hart District Sub Total	**10.84**	**3.99**	**2.65**	**8.92**	**3.72**	**48.29**	**33.95**	**41.04**	**1.87**	**8.17**	**163.44**
Basingstoke	0.95	0.22	0.00	1.55	0.34	0.46	0.59	9.70	0.00	n/a	13.81
Camberley	16.82	1.04	15.86	0.00	43.65	1.06	17.04	0.53	27.56	n/a	123.57
Farnham	4.34	6.83	1.73	54.56	0.34	2.84	1.11	0.41	1.32	n/a	73.47
Guildford	3.99	3.12	7.56	1.72	1.10	0.26	0.26	0.53	0.66	n/a	19.20
Woking	0.17	0.27	3.52	0.00	1.27	0.00	0.00	0.00	0.61	n/a	5.84
Other	14.40	4.26	24.29	8.83	29.98	5.42	7.61	6.03	20.57	n/a	121.39
Other Sub Total	**40.67**	**15.74**	**52.95**	**66.66**	**76.67**	**10.06**	**26.60**	**17.21**	**50.72**		**357.28**
TOTAL	**86.73**	**54.66**	**66.36**	**81.79**	**84.44**	**66.15**	**65.03**	**59.14**	**55.01**		**638.75**

Source: Tables 3 and 4

Table 11A: Rushmoor Summary of Food & Beverage Expenditure 2014 to 2037

	2014	2018	2022	2027	2032	2037
Available Expenditure in Rushmoor (£m)						
Farnborough	28.39	30.90	33.16	36.13	39.29	42.75
Aldershot	42.82	46.66	50.11	54.64	59.46	64.70
North Camp	5.45	5.97	6.42	7.03	7.67	8.35
Other Rushmoor	1.44	1.58	1.71	1.87	2.04	2.23
Rushmoor Borough Sub Total	**78.10**	**85.12**	**91.40**	**99.67**	**108.46**	**118.03**
Turnover of Existing Facilities (£m)						
Farnborough	28.39	29.55	30.75	32.31	33.96	35.70
Aldershot	42.82	44.55	46.36	48.73	51.21	53.83
North Camp	5.45	5.67	5.90	6.20	6.52	6.85
Other Rushmoor	1.44	1.50	1.56	1.64	1.73	1.82
Rushmoor Borough Sub Total	**78.10**	**81.27**	**84.58**	**88.89**	**93.42**	**98.19**
Surplus/Deficit Expenditure (£m)						
Farnborough	n/a	1.36	2.41	3.81	5.32	7.05
Aldershot	n/a	2.11	3.75	5.91	8.25	10.88
North Camp	n/a	0.30	0.52	0.82	1.15	1.50
Other Rushmoor	n/a	0.08	0.15	0.23	0.32	0.41
Rushmoor Borough Sub Total	**n/a**	**3.85**	**6.83**	**10.78**	**15.03**	**19.84**

Source: Tables 5 - 10

Table 11B: Hart Summary of Food & Beverage Expenditure 2014 to 2037

	2014	2018	2022	2027	2032	2037
Available Expenditure in Hart (£m)						
Blackwater	3.58	3.89	4.18	4.55	4.94	5.36
Fleet	57.86	63.11	67.81	73.89	80.25	87.07
Hook	4.55	4.97	5.35	5.84	6.36	6.90
Yateley	10.31	11.25	12.10	13.20	14.34	15.56
Hartley Wintney	13.27	14.49	15.59	17.01	18.49	20.06
Odiham	12.70	13.89	14.95	16.32	17.75	19.27
Other Hart	6.06	6.62	7.12	7.78	8.47	9.20
Hart District Sub Total	**108.31**	**118.23**	**127.12**	**138.59**	**150.60**	**163.44**
Turnover of Existing Facilities (£m)						
Blackwater	3.58	3.72	3.87	4.07	4.28	4.49
Fleet	57.86	60.20	62.65	65.84	69.20	72.73
Hook	4.55	4.73	4.92	5.18	5.44	5.72
Yateley	10.31	10.72	11.16	11.73	12.33	12.96
Hartley Wintney	13.27	13.81	14.37	15.10	15.87	16.68
Odiham	12.70	13.22	13.76	14.46	15.20	15.97
Other Hart	6.06	6.30	6.56	6.89	7.24	7.61
Hart District Sub Total	**108.31**	**112.71**	**117.29**	**123.27**	**129.56**	**136.17**
Surplus/Deficit Expenditure (£m)						
Blackwater	n/a	0.17	0.31	0.48	0.66	0.87
Fleet	n/a	2.91	5.16	8.04	11.05	14.34
Hook	n/a	0.24	0.43	0.67	0.92	1.19
Yateley	n/a	0.53	0.94	1.47	2.01	2.61
Hartley Wintney	n/a	0.69	1.23	1.91	2.62	3.38
Odiham	n/a	0.67	1.20	1.86	2.56	3.30
Other Hart	n/a	0.32	0.57	0.89	1.23	1.59
Hart District Sub Total	**n/a**	**5.52**	**9.83**	**15.32**	**21.04**	**27.27**

Source: Tables 5 - 10

Table 12: Food & Beverage Floorspace Capacity 2014 to 2037

	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,203	£5,414	£5,690	£5,981	£6,286
Floorspace Requirement (sq.m gross)						
Farnborough	n/a	261	446	670	890	1,122
Aldershot	n/a	405	692	1,039	1,379	1,730
North Camp	n/a	57	97	145	192	239
Other Rushmoor	n/a	16	27	40	53	65
Rushmoor Borough Sub Total	**n/a**	**739**	**1,261**	**1,894**	**2,513**	**3,157**
Blackwater	n/a	33	57	84	111	138
Fleet	n/a	558	954	1,414	1,848	2,281
Hook	n/a	46	79	117	153	189
Yateley	n/a	102	174	258	337	414
Hartley Wintney	n/a	132	226	335	437	538
Odiham	n/a	129	221	328	427	525
Other Hart	n/a	61	105	156	205	253
Hart District Sub Total	**n/a**	**1,061**	**1,816**	**2,692**	**3,518**	**4,338**

Table 13: Revised Study Area Population – Hart, Rushmoor and Surrey Heath Strategic Housing Market Assessment Projections

Zone	2011	2014	2018	2022	2027	2032	2037
Zone 1 - Farnborough	55,166	56,219	57,623	59,027	60,782	62,537	64,292
Zone 2 - Aldershot	37,843	39,664	42,092	44,520	47,555	50,590	53,625
Zone 3 - Guildford (Rural West)	34,670	35,980	37,309	38,417	39,746	40,953	41,998
Zone 4 - Farnham	38,678	39,283	40,328	41,476	42,798	43,979	45,061
Zone 5 - Camberley	39,951	40,979	42,350	43,721	45,435	47,148	48,862
Zone 6 - Fleet	31,789	33,400	35,548	36,553	37,333	38,113	39,108
Zone 7 - Yateley	33,518	33,809	34,197	34,480	34,790	35,100	35,500
Zone 8 - Hart (Rural West)	27,958	29,358	31,213	32,893	34,901	36,888	39,373
Zone 9 - Sandhurst	27,298	28,334	29,613	30,805	32,093	33,191	34,187
Total	**326,871**	**337,027**	**350,274**	**361,891**	**375,432**	**388,499**	**402,006**

Source: Experian MMG3 2011 Census Population, Hart, Rushmoor and Surrey Heath SHMA (Midpoint Employment Growth Scenario) and SNPP 2012 based projections for other LPA areas

Note: Population growth within Rushmoor and Hart redistributed

Table 14A: Rushmoor Summary of Food & Beverage Expenditure 2014 to 2037 – SHMA Population

	2014	2018	2022	2027	2032	2037
Available Expenditure in Rushmoor (£m)						
Farnborough	28.57	31.53	34.18	37.73	41.58	45.80
Aldershot	43.62	48.92	53.76	60.23	67.29	75.02
North Camp	5.46	6.02	6.52	7.19	7.90	8.66
Other Rushmoor	1.44	1.58	1.71	1.88	2.05	2.24
Rushmoor Borough Sub Total	**79.10**	**88.06**	**96.17**	**107.02**	**118.82**	**131.72**
Turnover of Existing Facilities (£m)						
Farnborough	28.57	29.73	30.94	32.52	34.18	35.92
Aldershot	43.62	45.39	47.23	49.64	52.18	54.84
North Camp	5.46	5.68	5.92	6.22	6.53	6.87
Other Rushmoor	1.44	1.50	1.56	1.64	1.72	1.81
Rushmoor Borough Sub Total	**79.10**	**82.31**	**85.65**	**90.02**	**94.61**	**99.44**
Surplus/Deficit Expenditure (£m)						
Farnborough	n/a	1.80	3.24	5.21	7.41	9.88
Aldershot	n/a	3.53	6.52	10.58	15.11	20.18
North Camp	n/a	0.34	0.60	0.97	1.36	1.79
Other Rushmoor	n/a	0.08	0.15	0.23	0.33	0.43
Rushmoor Borough Sub Total	**n/a**	**5.76**	**10.52**	**17.00**	**24.21**	**32.29**

Source: Tables 5 - 10

Table 14B: Hart Summary of Food & Beverage Expenditure 2014 to 2037 – SHMA Population

	2014	2018	2022	2027	2032	2037
Available Expenditure in Hart (£m)						
Blackwater	3.57	3.90	4.19	4.58	5.00	5.47
Fleet	58.73	65.76	71.17	77.90	85.20	93.52
Hook	4.63	5.21	5.71	6.38	7.11	7.97
Yateley	10.23	11.14	11.92	12.94	14.03	15.26
Hartley Wintney	13.56	15.31	16.86	18.92	21.17	23.87
Odiham	12.97	14.64	16.14	18.12	20.28	22.88
Other Hart	6.13	6.84	7.43	8.19	9.01	9.94
Hart District Sub Total	**109.82**	**122.80**	**133.43**	**147.04**	**161.80**	**178.91**
Turnover of Existing Facilities (£m)						
Blackwater	3.57	3.71	3.86	4.06	4.27	4.49
Fleet	58.73	61.12	63.60	66.84	70.25	73.84
Hook	4.63	4.82	5.01	5.27	5.54	5.82
Yateley	10.23	10.64	11.08	11.64	12.24	12.86
Hartley Wintney	13.56	14.11	14.68	15.43	16.22	17.04
Odiham	12.97	13.50	14.04	14.76	15.51	16.30
Other Hart	6.13	6.38	6.64	6.98	7.33	7.71
Hart District Sub Total	**109.82**	**114.28**	**118.92**	**124.99**	**131.36**	**138.06**
Surplus/Deficit Expenditure (£m)						
Blackwater	n/a	0.19	0.33	0.52	0.73	0.98
Fleet	n/a	4.65	7.57	11.06	14.94	19.69
Hook	n/a	0.39	0.70	1.11	1.57	2.15
Yateley	n/a	0.50	0.84	1.30	1.80	2.40
Hartley Wintney	n/a	1.20	2.18	3.49	4.95	6.83
Odiham	n/a	1.15	2.10	3.36	4.77	6.57
Other Hart	n/a	0.46	0.79	1.22	1.68	2.24
Hart District Sub Total	**n/a**	**8.52**	**14.51**	**22.06**	**30.44**	**40.85**

Source: Tables 5 - 10

Table 15: Food & Beverage Floorspace Capacity 2014 to 2037 – SHMA Population

	2014	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,203	£5,414	£5,690	£5,981	£6,286
Floorspace Requirement (sq.m gross)						
Farnborough	n/a	346	599	916	1,238	1,572
Aldershot	n/a	679	1,205	1,860	2,526	3,211
North Camp	n/a	65	112	170	228	285
Other Rushmoor	n/a	16	28	41	54	68
Rushmoor Borough Sub Total	**n/a**	**1,106**	**1,943**	**2,987**	**4,047**	**5,137**
Blackwater	n/a	36	60	91	122	156
Fleet	n/a	893	1,398	1,944	2,499	3,132
Hook	n/a	74	129	196	263	342
Yateley	n/a	96	155	228	301	381
Hartley Wintney	n/a	231	403	614	828	1,086
Odiham	n/a	220	387	591	797	1,046
Other Hart	n/a	88	147	214	281	356
Hart District Sub Total	**n/a**	**1,638**	**2,680**	**3,876**	**5,090**	**6,499**

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