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Alton Town Centre Study Draft Report

Alton Town Council

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1.0 Introduction

Purpose of the report

- 1.1 Lichfields was commissioned by East Hampshire District Council to prepare the East Hampshire Retail and Main Town Centre Uses Study, completed in October 2018 (RMTCUS 2018). The RMTCUS 2018 provided a quantitative and qualitative assessment of the need for new retail and main town centre uses for all towns in East Hampshire District including Alton. The study also included town centre health checks.
- 1.2 Lichfield has been commissioned by Alton Town Council to prepare a partial update of the RMTCUS 2018 focusing on the finding relating to Alton. The update includes:
- an overview of national trends;
 - an updated town centre health check for Alton;
 - an updated retail capacity assessment;
 - an updated food/beverage capacity assessment; and an
 - updated leisure need assessment.

Main town centre uses

- 1.3 Previously main town centre uses, as defined by the National Planning Policy Framework (NPPF), fell into to a range of different planning use classes e.g. A1 retail, A3/A4/A5 food/beverage, some D2 leisure uses and B1 offices. Evidence based studies have historically provided floorspace projections within these use class categories.
- 1.4 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 1.5 The UCO changes combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as ‘main town centre uses’ within the NPPF e.g., medical services and some light industrial uses.
- 1.6 This Alton update only provides floorspace projections for selected town centre activities now within Class E. The floorspace capacity projections in this update relate to convenience and comparison goods retail (previously A1) and restaurant/café use now in Class E and Sui Generis uses i.e., pubs/bar (previously A4) and takeaways (A5). The need for Class D2 commercial leisure uses has been assessed but not less intensive sport and recreational uses i.e. leisure uses not considered to be main town centre uses such as sports halls, swimming pools and sport pitches and courts.

Report structure

1.7

The report structure is as follows:

- Section 2.0: Overview of national trends;
- Section 3.0: Retail and food/beverage capacity assessment;
- Section 4.0: Commercial leisure need assessment;
- Section 5.0: Alton town centre health check;
- Section 6.0: Conclusions.

2.0 Overview of national trends

Implications of Brexit and Covid-19 and other trends

- 2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail and leisure floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace.
- 2.2 Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts. Experian's latest forecasts suggest slower retail expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021, 2022 and 2023) for retail and leisure were published in January 2022 and now reflect the potential impacts of Brexit and the Covid-19 pandemic. The main implications of Brexit, Covid-19 and now the cost of living crisis for the evidence base are likely to be as follows:
- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
 - short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure during 2022 and 2023; and
 - longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.
- 2.3 The key uncertainties relating to the first two points are primarily the length of the post Covid recovery period and impact of the cost of living crisis. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.
- 2.4 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 crisis. Short-term supply chain disruption has led to inflationary pressure, which will have an impact of consumer demand. The cost of living crisis has exacerbated these recent trends.
- 2.5 Retailers with infrastructure to fulfil on-line orders/home delivery benefitted from the Covid lockdowns at least in the short term. There is likely to be a longer term structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.
- 2.6 Bearing these trends in mind, following Covid-19 and during the cost of living crisis, there is likely to be a spike in town centre vacancies with some businesses failing, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g. most recently Gap, Wilko and Marks & Spencer.
- 2.7 Covid-19, Brexit and the Ukraine war could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the local plan period with interval projections

(i.e. to 2026, 2026 to 2031 and 2031 to 2036), development plan policy should assume population projections will return to projected levels by 2026. The first interval population projections in 2026, and certainly later years, should not be significantly affected by these circumstances.

- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, during the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. In November 2021, the seasonally adjusted figures were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was significantly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 level during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak 81% higher than pre-Covid levels.
- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing. The potential impact of the cost of living crisis and predicted recession are unclear at this stage but suggest a cautious approach to short-term growth is required.
- 2.13 Reflecting these trends, Experian's latest projections recommend relatively modest levels of expenditure growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

Long-term expenditure trends

- 2.14 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to

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

- 2.15 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Alton and East Hampshire District is likely to relate to population growth or qualitative areas of deficiency.
- 2.16 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.17 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:
- "After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."*
- 2.18 The floorspace capacity projections for Alton make an allowance for future growth in e-tailing based on Experian's latest forecasts. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, in part due to growth in home shopping and click and collect.

Demand for town centre floorspace

- 2.19 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector had an impact on the high street in the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates then gradually recovered to 11.8% by 2018 but then increased to 14.7% in 2022. There was a sharp increase in shop vacancies in many town centres due to the impacts of Covid-19 and the growth in on-line shopping.
- 2.20 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e.,

an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Retailers and leisure operators have been continuing to 'right size' their property portfolios, with many operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure property assets. These trends are likely to be exacerbated by the cost of living crisis, at least in the short-term.

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

Food store and discount operators

- 2.22 Retail operators have responded to changes in customers' requirements by changing their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

- 2.23 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016 during their rapid expansion programme. This trend for small convenience stores has now slowed.

- 2.24 Several proposed larger food stores have not been implemented across the UK. The proposed Tesco superstore in Alton is a good example of this. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits.

- 2.25 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade and continues post Covid-19. More recently Home Bargains and B&M have expanded their discount stores. These trends are evident in Alton with an Aldi store completed in 2014 at Alton Retail Park and Lidl and Home Bargains stores under construction at Mill Lane Retail Park.

Comparison retailers

- 2.26 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends slowed significantly before the Covid pandemic and are unlikely to re-emerge for the foreseeable future.

- 2.27 The demand for premises within the bulky goods sector, i.e., furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is represented in Alton i.e. Wickes and Pets at Home at Alton Retail Park.

- 2.28 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional

and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in Alton with a limited number of comparison goods national multiples present. Most multiple retailers are concentrated in larger centres e.g. in Basingstoke, Guildford, Southampton and Winchester.

- 2.29 In general, comparison operator demand for space has decreased during the last decade and, of those national multiples looking for space, many still prefer to locate in larger centres. Alton is a lower tier centre in the shopping hierarchy and multiple operator demand is likely to be lower in the future. Nationally, much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future.
- 2.30 Within larger centres some anchor comparison goods stores have closed due to national restructuring e.g., the closure of Bhs, Debenhams and House of Fraser stores, which has created large voids in many town centres. This trend has been evident in larger centre in Hampshire rather than Alton.
- 2.31 The continuation of these trends will influence future operator requirements in Alton and the town centre units are likely to become less attractive for new comparison goods multiple occupiers. However, smaller vacant units in Alton could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the Covid-19 pandemic and cost of living crisis.

Charity and discount shops

- 2.32 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (previously Class A1 and now Class E). In many centres, charity shops have occupied vacated shop premises during economic downturns. This trend is evident in Alton with a strong presence of charity shops (8 outlets).
- 2.33 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops if and when the market recovers.

Non-retail services

- 2.34 Alton has a reasonable provision of non-retail services, just below the UK average (45.8% compared with the UK average of 46.6% of shop units), see Section 5. Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. These non-retail service uses include:
- hairdressers, dry cleaners, travel agents, some sandwich shops, funeral parlours and post offices;
 - banks, building societies, financial services, betting shops, pawnbrokers/money lenders, estate agents and employment agencies;
 - restaurants, cafés and hot food takeaways; and
 - pubs/bars.
- 2.35 The proportion of betting shops/amusement arcades in Alton is relatively low, with only two outlets. The provision of hot food takeaways is similar to the UK average, but restaurants/cafés and pubs/bars is below average. A more detailed analysis is shown in Section 5 of this report.

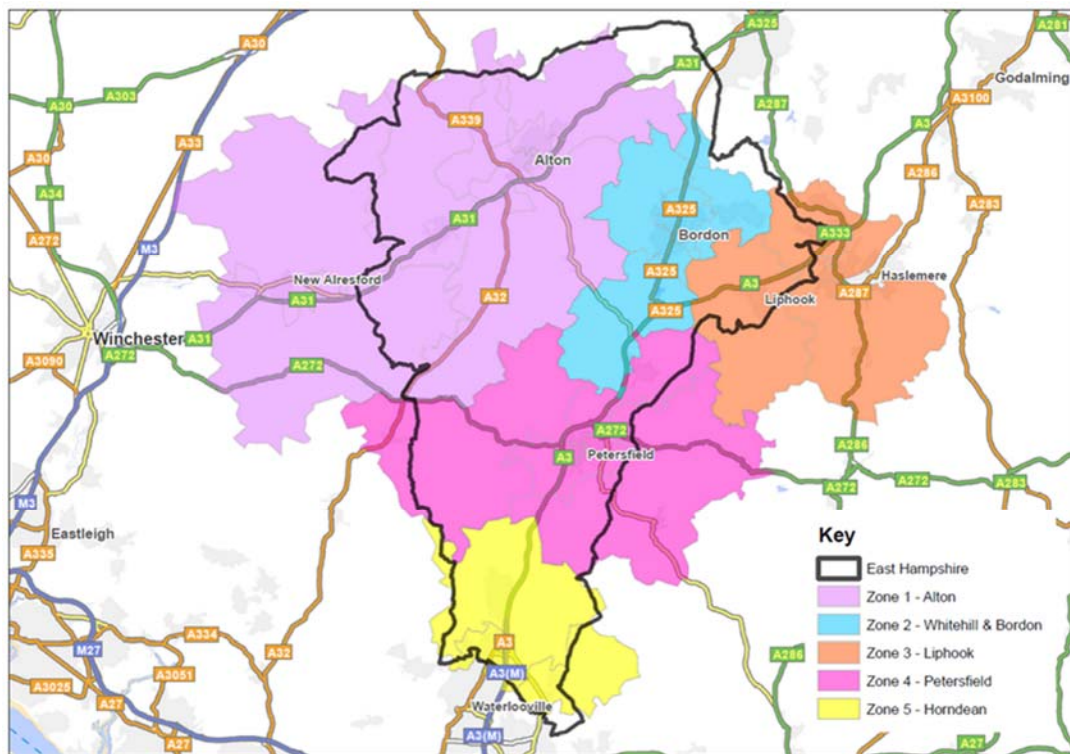
3.0 Retail and food/beverage capacity

Introduction

3.1 This section updates the quantitative assessment of the scope for new retail and food/beverage floorspace in Alton, previously set out in the RMTCUS 2018. The updated floorspace projections adopt Experian’s latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates.

Study area

3.2 The quantitative capacity analysis is based on the study area zones adopted in the RMTCUS 2018. The RMTCUS adopted five zones covering East Hampshire District, as shown below.



3.3 The results of the household shopper survey conducted in 2018 indicated that Alton attracts trade from four of these five zones. Very limited trade was attracted to Alton from Zone 5 (Horndean). The other four zones have been adopted in the updated assessment, as shown in Appendix 1.

Population projections

3.4 Experian’s latest MMG3 population projections have been adopted as shown in Table 1 (Appendix 2). The RMTCUS 2018 adopted Experian population projections published in 2016.

3.5 Experian’s latest data suggests population within the four study area zones is projected to increase by 5.8% between 2022 to 2036, increasing from 135,299 in 2022 to 143,149 in

2036. Experian's previous 2016 data suggested a slightly higher population projection of 145,190 in 2036.

Expenditure forecasts

- 3.6 All monetary values expressed in this update report are at 2020 prices, consistent with Experian's latest expenditure information. The RMTCUS 2018 adopted a 2016 price base and therefore the figures are not directly comparable.
- 3.7 Experian's latest local expenditure figures for the four study area zones in 2020 have been adopted. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:
- convenience goods: -5.5%;
 - comparison goods: +7.0%;
 - leisure: +52.8%.
- 3.8 Experian's short term forecasts, particularly for comparison goods and leisure, assume a strong post-Covid lockdowns recovery during 2021 and 2022. Experian's medium and long term growth average forecasts have been adopted, as follows:
- convenience goods: +0.1% per annum growth for during 2024 and beyond;
 - comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
 - leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.
- 3.9 These growth figures relate to real growth and exclude inflation.
- 3.10 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2020 were:
- 5.4% of convenience goods expenditure; and
 - 25.6% of comparison goods expenditure.
- 3.11 Experian's forecasts suggest that these SFT percentages will increase to 7.2% and 28.6% by 2031 respectively. The longer term Experian forecasts suggest an increase to 7.5% and 29.6% by 2036 respectively.
- 3.12 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2036, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.
- 3.13 Allowing for the population growth, total convenience goods spending within the four study zones is forecast to increase by +5.2% from £365.1 million in 2022 to £384.09 million in 2036, as shown in Table 3 in Appendix 2. This growth projection excludes SFT.
- 3.14 Comparison goods spending is forecast to increase by +45.1% between 2022 and 2036, increasing from £520.55 million in 2022 to £755.47 million in 2036, as shown in Table 3 in Appendix 3. Again this growth projection excludes SFT.
- 3.15 Food and beverage spending is forecast to increase by +21.2% between 2022 and 2036, increasing from £212.57 million in 2022 to £257.66 million in 2036, as shown in Table 3 in Appendix 4.

Growth in turnover densities

- 3.16 Experian's Retail Planner Briefing Note 19 - January 2021 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +9.7% during 2022 and 2023, recovering from the impact of the Covid crisis, but lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 3.17 For convenience goods retail sales densities, Experian indicates an increase of +4.3% during 2022 and 2023, but lower growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.
- 3.18 Experian does not provide projections for food and beverage sales densities. However growth has been assumed during 2022 and 2023 in this study, in line with high expenditure growth. This growth reflects the necessary period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 0.5% per annum has been adopted.

Base year market shares

- 3.19 Expenditure patterns in the 2022 base year adopt market shares within each study area zone taken from the RMTCUS 2018. These market shares were calculated from the results of a household shopper survey in 2018. These market shares are assumed to have remained constant up to 2022 and beyond for comparison goods retail and food/beverage uses, because there have been no significant changes in provision since the RMTCUS 2018, although the amount of SFT expenditure deducted has increased based on Experian's latest data. Higher levels of SFT have now been deducted.
- 3.20 Future market shares for convenience goods retailing have been amended at 2026 and beyond to reflect the proposed Lidl and Home Bargains store at Mill Lane Retail Park.

Capacity for convenience goods retail floorspace

- 3.21 Available convenience goods expenditure attracted to Alton has been projected from the 2022 base year forward to 2026, 2031 and 2036, and is summarised in Table 11 in Appendix 2. Convenience goods expenditure available to facilities within Alton is expected to increase from £77.69 million in 2022 to £90.47 million in 2036. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT).
- 3.22 The benchmark turnover of existing food stores and floorspace has been updated as shown in Table 10 in Appendix 2. This table adopts the latest ORC food store sales floorspace data and GlobalData's latest company average sales densities. The combined benchmark turnover of existing food stores and convenience goods shops in Alton is £81.38 million. The 2022 base year available expenditure figure is £77.69 million which is marginally lower than the benchmark turnover estimate (£81.38 million). The existing small expenditure deficit is -£3.69 million. The RMTCUS 2018 suggested a larger deficit of -£17.36 million in 2018 (2016 prices). The deficit has reduced between 2018 to 2022 due to population and expenditure growth. Convenience goods retail sales floorspace in Alton is now collectively trading satisfactorily about 4.5% below average.

- 3.23 Table 11 subtracts the turnover of existing and proposed floorspace from available expenditure to calculate the amount of surplus/deficit expenditure. There is projected convenience goods expenditure deficit of -£8.25 million in 2026 due to the implementation of the Lidl and Home Bargains stores at Mill Lane Retail Park. Longer term growth suggests this deficit will reduce to -£6.6 million in 2031, and then to -£5.01 million in 2036.
- 3.24 The deficit expenditure projections have been converted into floorspace estimates Table 11 in Appendix 2, based on an average sales density of £12,000 per sq.m net in 2022, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The negative floorspace capacity results are summarised in Table 3.1.

Table 3.1 Convenience goods floorspace capacity (sq.m - cumulative)

	2026	2031	2036
Sales floorspace (sq.m net)	-675	-539	-409
Total floorspace (sq.m gross)	-964	-770	-585

Source: Table 11, Appendix 2

- 3.25 Deficit expenditure up to 2036 indicates that there is a potential over-supply of convenience goods floorspace in Alton of 585 sq.m gross in 2036. These projections suggest there is no capacity for further convenience goods retail floorspace over and above existing commitments i.e. the new Lidl and Home Bargains stores. The negative floorspace projections do not necessarily suggest convenience goods retail outlets will be forced to close. However some of the main food stores are likely to trade below their respective company averages.
- 3.26 The RMTCUS 2018 suggested a more significant over-supply of convenience goods retail floorspace of 4,166 sq.m gross in Alton in 2036. The RMTCUS assumed a larger food superstore, rather than a Lidl and Home Bargains store, would be implemented in Alton, hence the larger projected floorspace over-supply.

Capacity for comparison goods floorspace

- 3.27 Available comparison goods expenditure has been projected to 2026, 2031 and 2036 as summarised in Table 10 in Appendix 3. Comparison goods expenditure available to facilities within Alton is expected to increase from £44.32 million in 2022 to £64.59 million in 2036.
- 3.28 Existing comparison goods sales floorspace in Alton is 9,973 sq.m net excluding commitments under-construction, as shown in Table 9 in Appendix 3. The average sales density in 2022 is estimated to be £4,444 per sq.m net. As indicated in the RMTCUS 2018, average sales densities of between £3,000 to £6,000 per sq.m net are generally achieved by medium sized centres such as Alton. Current trading levels in Alton are, at best, satisfactory in the light of difficult market conditions for the comparison goods retail sector.
- 3.29 Table 10 in Appendix 3 subtracts the turnover of existing and proposed floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus/deficit expenditure. The projections suggest future growth in available expenditure will be offset by the implementation of commitments and expected growth in turnover densities up to and beyond 2036 i.e., existing retail businesses and planned developments will absorb all expenditure growth.

- 3.30 This assumption is consistent with Experian’s projected growth in non-store sales taken by retail businesses. The growth in retail operator’s turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 3.31 In 2036 there is still a projected expenditure deficit of -£4.32 million. Deficit comparison goods expenditure has been converted into negative comparison goods floorspace projections in Table 10 in Appendix 3, as summarised in Table 3.2.

Table 3.2 Comparison goods floorspace capacity (sq.m gross -cumulative)

	2026	2031	2036
Sales floorspace (sq.m net)	-757	-641	-515
Total floorspace (sq.m gross)	-1,009	-855	-688

Source: Table 10, Appendix 3

- 3.32 The comparison goods expenditure deficit up to 2036 suggests an over-supply of retail floorspace, resulting in negative floorspace projections i.e. 688 sq.m gross. Consistent with recent trends in Alton and across the UK there may be a further reduction in comparison goods sales floorspace in Alton. The projections imply a 5% reduction by 2036 i.e. a loss of 515 sq.m net out of an existing total of 9,973 sq.m net.
- 3.33 The RMTCUS 2018 suggested a floorspace under-supply rather than over-supply of comparison goods retail floorspace in 2036 i.e. +3,545 sq.m gross rather than -688 sq.m gross. The RMTCUS assumed higher population and expenditure growth up to 2036.

Capacity for food/beverage floorspace

- 3.34 Available food and beverage expenditure has also been projected forward to 2026, 2031, and 2036, and is summarised in Table 10 in Appendix 4. The amount of expenditure attracted to Alton is expected to increase from £31.83 million in 2022 to £38.76 million in 2036.
- 3.35 Existing food/beverage floorspace in Alton is 6,300 sq.m gross, as shown in Table 9 in Appendix 4. The average sales density in 2022 is estimated to be £5,386 per sq.m gross. As indicated in the RMTCUS 2018, average sales densities of around £5,000 per sq.m gross are generally achieved by food/beverage outlets based on Lichfields’ experience. Current trading levels in Alton during 2021 appear to be satisfactory.
- 3.36 Table 10 in Appendix 4 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new uses. There is a small expenditure surplus of +£1.53 million in 2026. Continued population and expenditure growth creates a higher surplus of +£3.17 million in 2031 increasing to +£4.63 million in 2036. Surplus expenditure has been converted into food/beverage floorspace projections in Table 10 in Appendix 4, as summarised in Table 3.3 below.

Table 3.3 Food and beverage floorspace capacity (sq.m gross - cumulative)

	2026	2031	2036
Total floorspace (sq.m gross)	278	563	801

Source: Table 10, Appendix 4

- 3.37 Surplus expenditure up to 2036 indicates that there is capacity for additional food/beverage floorspace in Alton of 801 sq.m gross.
- 3.38 The RMTCUS 2018 suggested a small over-supply rather than under supply of food/beverage floorspace in 2036 i.e. -70 sq.m gross rather than +801 sq.m gross. The RMTCUS assumed development at Whitehill Bordon (new town centre) would reduce Alton's market share of food/beverage expenditure. The capacity figures in Table 3.3 assume Alton can maintain its current market share of expenditure.

Operator space requirements

- 3.39 The Requirements List publishes potential space requirements from multiple operators. The current list for retail and food/beverage operators includes Aldi, Lidl, Savers and Dominoes, but these requirements have now been accommodated in Alton. The other operators who may have a space requirement in Alton are listed below.

Convenience goods retailers

- Heart of England Co-operative - convenience stores 2,000 to 3,000 sq.ft
- Taj The Grocer - vegan and organic store 2,500 to 4,000 sq.ft

Comparison goods retailers

- AGA Rangemaster -kitchen appliances 3,000 to 4,000 sq.ft
- Matalan - fashion and homeware 15,000 to 25,000 sq.ft
- Sussex Beds -bed retailer 2,000 to 5,000 sq.ft
- The Range - home, garden and leisure 15,000 to 30,000 sq.ft
- Flooring Superstore - flooring retailer 3,000 to 5,500 sq.ft
- Connection Flooring- flooring retailer 3,500 to 5,500 sq.ft
- Schmidt - kitchen showroom 1,500 to 5,000 sq.ft
- Bargain Buys (Poundstretcher) - discount store 5,000 to 25,000 sq.ft
- British Heart Foundation – charity 5,000 to 8,000 sq.ft
- The Works - discount retail chain 1,500 2,000 sq.ft
- ECigWizard- electronic cigarettes 300 to 1,000 sq.ft

Food/beverage outlets

- Zambrero – Mexico restaurant 800 to 2,000 sq.ft
- Vantage Pubs - Boutique community pubs 3,000 to 8,000 sq.ft
- Camile Thai -Thai food 900 to 1,500 sq.ft
- Vapiano - Euro-chic restaurant 3,500 to 12,000 sq.ft
- KFC -fast food restaurant 1,800 to 3,500 sq.ft
- Fego Caffè - all day restaurant 1,500 to 4,500 sq.ft

- 3.40 This potential list of space requirements suggest market demand could be stronger than the quantitative floorspace capacity projections outlined above, particularly for comparison goods retail. However, many of the requirements are for medium to large units (over 2,000 sq.ft/200 sq.m). Most of the vacant shop units in Alton town centre are less than 200 sq.m gross and may be too small to accommodate operator requirements.
- 3.41 Furthermore, The Requirements List includes general space requirements in broad areas of search or within towns with particular characteristics. Whilst Alton may fall within the areas of search or have the necessary characteristics, some of the listed operators may not be actively looking for space in Alton. The list of space requirements needs to be treated with caution, but it does provide a useful aspirational list of the types of operators the town could attract in the future.

4.0 Commercial leisure need assessment

Introduction

4.1 This section updates the needs assessment for other main town centre uses including commercial leisure, entertainment and cultural uses i.e., cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study or the RMTCUS 2018.

Leisure and cultural expenditure

4.2 Experian local expenditure data for the four study area zones and projections indicates the resident population generated £63.6 million in 2022 (an average of £470 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £4.6 million;
- live entertainment i.e., theatre/concerts/shows £10.4 million;
- museums, theme parks, houses and gardens £4.6 million;
- admissions to clubs, dances, discos, bingo £5.0 million;
- other miscellaneous entertainment £9.6 million;
- subscriptions to sports and social clubs £15.9 million; and
- leisure class fees £13.5 million.

4.3 A small proportion of this leisure spend from residents in the study area is currently spent in Alton due to the limited provision of leisure, entertainment and cultural facilities in the town. The household survey results have been used to estimate the household participation rates and Alton's share of leisure trips within the study area, as shown in Table 4.1. The participation and market shares varies significantly for each activity.

Table 4.1 Leisure participation and trip retention (% of households in the four study area zones)

Leisure activity	% households participating	% trips attracted to Alton
Cinema	60.9	7.5
Theatre	46.0	0.0
Nightclub	4.8	0.0
Bingo	2.4	0.0
Health/fitness club	27.0	21.4
Tenpin bowling	15.1	0.0
Museum	41.7	4.7
Art gallery	26.4	1.7
Ice rink	9.8	0.0
Trampoline centre	11.1	0.0

Source: NEMS Household Survey – August 2018

4.4 Taking account these market shares and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Alton currently attracts less than 10% of resident's total leisure expenditure in the four study area zones, compared with about 8% of

comparison goods retail expenditure and 14% of food/beverage expenditure. If the 10% market share is correct, then leisure expenditure currently attracted to Alton in 2022 is about £6.4 million (10% of £63.6 million).

Leisure/cultural floorspace capacity

- 4.5 Goad Plans indicates Alton town centre has only three leisure/cultural uses with a ground floor area of 790 sq.m e.g. cinema, museum and art gallery. There are 7 Sport England registered health and fitness facilities in or near Alton, as shown below, which make up most of the town's existing leisure provision.
- 4.6 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 9.6% between 2022 to 2031, or by 14.6% between 2022 to 2036, which will generate an additional +£3.1 million by 2031 or +£9.3 million by 2036 for these activities in the study area. With population growth (4.2% by 2031 or 5.8% by 2036) expenditure on these leisure/cultural activities attracted to Alton should increase from £6.4 million to £7.3 million by 2031 and then to £7.8 million by 2036, an additional £0.9 million by 2031 or £1.4 million by 2036. This additional expenditure growth could support as a minimum about 500 sq.m of new commercial leisure/cultural floorspace by 2031, based on an average of £2,000 per sq.m., increasing to 700 sq.m by 2036.
- 4.7 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 4.8 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).
- 4.9 The Cinema Advertising Association identifies 843 cinema facilities with 4,596 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per screen per annum or 220 trips per seat per annum.
- 4.10 Palace Cinema in Alton, providing 2 screens and 171 seats, is the only full-time cinema in East Hampshire District. Lichfields understands this cinema may close in the near future.
- 4.11 British Film Institute information suggest the participation rate for visiting cinemas is 52% for adults in the UK. The 2018 household survey results suggested a slightly higher participation of 61% for household in the study area. These figures suggest a slightly higher average of 3 trips per person could be adopted in the Alton study area. The population within the Alton study area in 2022 (135,299 people) would generate around 406,000 trips based on 3 trips per person.

- 4.12 Experian’s local expenditure data indicates the study area generates £4.6 million on cinema trips. This expenditure estimate appears to be consistent with the 406,000 cinema trip estimate i.e., an average of about £11.30 per person each trip.
- 4.13 The 2018 household survey results suggested Alton attracted 7.5% of cinema trips from the Alton study area, which is around 30,500 trips out of the 406,000 cinema trip total.
- 4.14 Adopting the national average population per cinema screen (38,000 trips per screen), implies that 406,000 trips generated in the Alton study area is sufficient demand for nearly 11 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 406,000 trips could support 1,845 seats.
- 4.15 Alton’s current share of this potential (30,500 trips) theoretically supports less than one screen and 139 seats, based on the national averages. Most cinema trips generated by the resident population in the Alton study area are attracted to cinemas in Basingstoke (17.6%) and Guildford (16.7%), Portsmouth (14.8%) and Chichester (8.2%).
- 4.16 The new town centre proposed at Whitehill and Bordon included a 6 screen cinema as part of phase 1. If implemented this proposal will limit potential for improved cinema provision in Alton, even if the Palace Cinema closes.

Theatres, nightclubs, live music and other cultural activities

- 4.17 The 2018 household survey results indicate 46% of respondents in the Alton study area visit theatre and less than 5% visit nightclubs.
- 4.18 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34 million tickets visits, generating ticket revenue of £1.28 billion in 2018 (i.e. pre-Covid lockdowns). The average ticket revenue per venue was £5.7 million. The UK average attendance per performance is 545.
- 4.19 The household survey results indicate the participation rate for theatres is reasonably high (46%) in the Alton study area. Experian’s local expenditure data indicates the study area generates £10.4 million on live theatre, concerts and shows. Assuming the national average ticket revenue per venue (£5.7 million) these figures suggest there is capacity for nearly two venues in the Alton study area. However, theatre trips generated by the resident population in the Alton study area are attracted to facilities in Central London (37.9%), Chichester (15.8%), Southampton (10.8%), Guildford (8.2%), Basingstoke (4.5%) and Portsmouth (4.3%).
- 4.20 Alton’s catchment population is unlikely to be sufficient to support a full-time theatre facility.
- 4.21 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 4.22 The household survey results indicate the participation rate for nightclubs/live music venues is relatively low (5%) and most participating residents in the Alton study area visit nightclubs/live music venues in Southampton, Guildford, Winchester and Portsmouth. Based on the low participation rate and access to facilities in larger centres, there appears to be no qualitative or quantitative need to provide nightclub/live music facilities in Alton.

4.23 The 2018 household survey results indicate 42% of respondents in the study area visit museums and 26% visit art galleries. Experian’s local expenditure data indicates the study area generates £4.6 million on museums, theme parks, houses and garden. Alton has two small attractions at the Curtis Museum and the Allen Gallery.

4.24 Population growth and expenditure growth (+21%) could increase this expenditure to £5.6 million by 2036. This £1 million increase in expenditure is unlikely to support significant additional facilities in Alton. Nevertheless, in relation to cultural facilities in Alton, the town’s strategy needs to be flexible to respond to any emerging opportunity for a new facility of this kind.

Health and fitness clubs

4.25 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.

4.26 The Sport England/Active Places data indicates that there are 7 registered health and fitness facilities in or near Alton, with 266 fitness stations, as shown in Table 4.2.

Table 4.2 Health and Fitness Clubs in Alton (Sport England/Active Places Data, 2022)

Name	Type	No. Fitness Stations
Alton School	Private Use	9
Alton Sports Centre	Registered Membership use	130
Blacknest Golf and Country Club	Pay and Play	15
Eggars School	Private Use	14
Energique Health Club and Spa	Registered Membership use	45
HSDC Alton	Private Use	16
Results Health Club (Alton)	Registered Membership use	37
Total		266

Source: Sport England Active Places – September 2022

4.27 The household survey results suggest the health and fitness club participation rate is about 27% of households. Alton’s market share of health and fitness trips is about 21.4%, suggesting a health and fitness catchment population of about 29,000 in 2022 (21.4% of 135,299 people). This catchment population estimate indicates that Alton has nearly 9.2 fitness stations per 1,000 people (266 registered stations in total).

4.28 The South East region has 1,269 Sport England registered health and fitness facilities with 69,690 fitness stations (average of 55 stations per facility). This existing provision equates to about 7.5 registered fitness stations per 1,000 people in the South East region. Alton’s health and fitness catchment population has a higher provision of fitness registered stations (9.2 stations per 1,000 people) than the South East average (7.5 stations), suggesting higher participation rates.

- 4.29 Demand for additional facilities within Alton should arise from future population growth and/or increased participation rates. As indicated above, the study area population generates £15.9 million on subscriptions to sports and social clubs. Alton's share of this expenditure is about £3.4 million (21.4%), which equates to about £12,800 per fitness station.
- 4.30 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 14.6% between 2022 to 2036, which is likely to include an increase in participation rates. With population growth (+5.8%), expenditure on this activity should increase from £3.4 million to £4.1 million by 2036, an additional +£0.7 million. Based on £12,800 per fitness station, this additional expenditure could support 55 new fitness stations by 2036, which could support an additional medium sized facility.
- 4.31 The Requirements List outlined in Section 3, suggests Hotpod Yoga studios may have a space requirement for 1,500 to 2,000 sq.ft in Alton.
- 4.32 Based on the analysis above, there could be potential for an additional health and fitness facility in Alton.

Tenpin bowling, family entertainment and other indoor leisure innovations

- 4.33 Across the country freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for family entertainment activities including trampolines, climbing, escape rooms, ice and roller skating and indoor golf etc.
- 4.34 The household survey results suggested the tenpin bowling participation rate was only 15%. Alton and East Hampshire does not have a tenpin bowling facility. Hollywood Bowl in Basingstoke is the nearest facility to Alton. There are other tenpin bowling facilities in Southampton, Portsmouth, Chichester and Camberley.
- 4.35 The Alton study area population (135,299 people) could theoretically support 11 tenpin bowling lanes, based on one lane per 12,000 people (national average). Most tenpin bowling facilities tend to have at least 20 lanes. Alton's limited catchment population and the existing provision of facilities in larger surrounding towns will restrict the potential for a tenpin bowling facility within Alton. A small facility as part of a multi-purpose leisure use could be provided.
- 4.36 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 4.37 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 4.38 Existing facilities in the sub-region include Flip Out and Atmosphere trampoline Park in Basingstoke, Air Hop in Guildford, Jump In Camberley, Flip Out in Portsmouth and Flip Out in Southampton. Alton's catchment area population is likely to be too small to support a trampoline park.

- 4.39 Escape rooms have emerged in recent years, including ClueCapers Escape Rooms in Winchester, Genius Escapes in Eastleigh, Exciting Escapes in Basingstoke and Paradox Parlours in Guildford. Indoor climbing attractions are available in Basingstoke, Fleet, Portsmouth and Southampton.
- 4.40 These leisure innovations are likely to continue in the future. The strategy for Alton should be flexible to respond to any emerging demand. There may be emerging opportunities for small scale facilities or combined entertainment facilities e.g. soft-play, trampolines, climbing etc.

Bingo, games of chance and gambling

- 4.41 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 (i.e., converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 4.42 The Gambling Commission indicates there were 601 bingo facilities in Great Britain (August 2020) and 131 casinos. The number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The latest figures equate to approximately one bingo facility per 110,000 people, and one casino per 480,000 people. Population in the Alton study area (135,299) is theoretically sufficient to support one bingo facility, based on the national averages.
- 4.43 There are no major bingo facilities in Alton. Buzz Bingo facilities are located in Basingstoke and Aldershot. Whilst there is theoretical scope for a bingo facility in Alton's wider catchment area, the national decline in the number of bingo premises and increase on-line gambling suggest there may limited operator demand to open new facilities.

Conclusions on commercial leisure uses

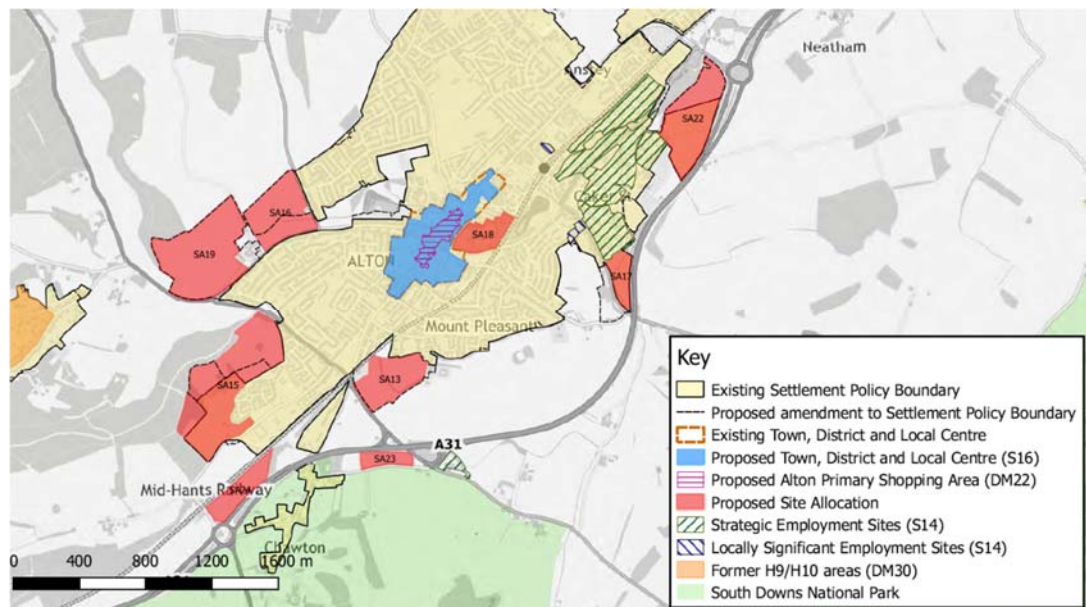
- 4.44 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g., exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential future demand.
- 4.45 In global terms future leisure expenditure from the catchment population could support as a minimum 700 sq.m of new commercial leisure and cultural floorspace by 2036. This additional modest floorspace potential could include an additional health/fitness facility and small scale leisure/cultural innovations. The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

5.0 Alton town centre health check

Introduction

- 5.1 The Regulation 18 Draft East Hampshire Local Plan (2017-2036) designates Alton as a 'Town Centre' at the top of the authority area's retail hierarchy, above district and local centres. The local planning authority will adopt a 'town centres first' approach to proposals for retail, leisure and other main town centre uses. The Local Plan Policies Map identifies the town centre boundary and the Primary Shopping Area, as shown in Figure 5.1. Draft Policy DM20 seeks to protect and improve the provision of retail uses and other main town centre uses that meet local needs within the designated town centre. Proposals for retail uses will be supported in the Primary Shopping Area (draft Policy D22), which represents the core area of the town centre.

Figure 5.1 East Hampshire Draft Local Plan Policies Map - Alton extract



- 5.2 Alton is a historic market town that predominantly serves the north of East Hampshire District. Its nearest competing centres are Whitehill and Bordon to the east; New Alresford to the west; Petersfield to the south; Farnham to the northeast and Basingstoke to the north. Alton falls within the regional and sub-regional shopping catchment areas of Basingstoke, Guildford, Southampton and Winchester and a significant proportion of residents' expenditure leaks from the local area to these larger shopping and leisure destinations.
- 5.3 A health check of Alton town centre was prepared as part of the RMTCUS 2018. This section updates the town centre health check based on recent land use information provided by Goad Plans in February 2022.

Alton town centre's key roles

- 5.4 Since 2018 Alton has retain its key roles, as follows:
- **Convenience goods retail** – the town centre continues to provide a good range of convenience stores and shops, including Sainsbury's (3,318 sq.m net), Marks and

Spencer Simply Food (1,077 sq.m net), Iceland (729 sq.m net) and Co-op (157 sq.m net). Other specialist independent shops include newsagents, health foods, a butcher, an off licence and bakers. The Waitrose store (1,557 sq.m net) is within walking distance of the town centre and there is an out of centre Aldi store at Alton Retail Park (968 sq.m). A new out of centre Lidl store is under-construction.

- **Comparison goods retail** – this role has reduced slightly since 2018 but remains important to Alton overall retail offer. The main anchor stores include M&Co, Boots, WH Smiths and Peacocks. The Primary Shopping Area along the High Street provides a focus for comparison goods outlets suitable for window shopping. There is a reasonable mix of national multiples and independent shops.
- **Non-retail services** – the town centre continues to provide a good range of non-retail service uses, including beauty salons, hairdressers, opticians, banks, estate agents, betting shops, legal and professional services.
- **Food and beverage** – the centre provides a reasonable range of food and beverage uses, including cafés, restaurants, public houses and takeaways. However, as in 2018, there is a limited choice of national restaurant/café chains.
- **Entertainment/Leisure** – this role is relatively limited but includes the Palace Leisure cinema, Curtis Museum, Allen Gallery and 3 hotels.
- **Community facilities** – the centre has a small selection of community facilities providing valuable services to local residents, including a library, citizens advice bureau, community halls, health and dental surgeries and churches.
- **Office employment** – the town centre has several small office buildings. The Goad Plan identifies 19 offices building with a ground floor area of 23,400 sq.m.

5.5 A street market is held on Alton High Street every Tuesday, as well as regular craft and farmers markets. The High Street is closed during the daytime on Tuesdays. There is a farmer's market on the second Saturday of each month.

5.6 The convenience goods retail expenditure attracted to Alton is around £77.69 million in 2022 (Table 5, Appendix 2). The Sainsbury's at Draymans Way attracts a high proportion of this trade (48%), Aldi at Alton Retail Park is the next highest (25%). The comparison goods retail expenditure attracted to Alton is less significant at £44.32 million in 2022 (Table 5, Appendix 3). Food and beverage expenditure attracted to Alton is £31.83 million in 2022 (Table 5, Appendix 4). The combined turnover of Alton is nearly £154 million in 2022.

Mix of uses

5.7 Alton town centre has 205 shop and services units within the designated centre boundary. The total ground floor area of these units totals 35,310 sq.m gross, and average of 172 sq.m gross per unit. This floorspace figures excludes office uses (23,400 sq.m) and leisure/community uses. The diversity of shop and service units within the centre in 2018 and 2022 is set out in Table 5.1, which is compared with the current Goad UK national average.

5.8 Consistent with recent national trends, there has been a reduction in the number of comparison goods shops and financial/professional services (e.g. banks/building societies) since the 2018 centre health check. These losses have not been offset by the growth in food/beverage outlets and other non-retail services, which has led to a small increase in the number of vacant units from 30 to 33 vacant units since 2018. The current shop vacancy rate (16.1%) is higher than the UK average (14.7%).

Table 5.1 Alton - Mix of uses

Type of Unit	Number of units 2018	Number of units 2022	% of units 2022	% UK average 2022
Comparison goods retail	66	59	28.8	29.0
Convenience goods retail	17	15	7.3	9.7
Financial/professional services	33	23	11.2	9.0
Restaurants/Cafés	12	16	7.8	10.0
Pubs/Bars	9	8	3.9	4.9
Hot food takeaways	10	13	6.3	6.2
Other non-retail services	28	38	18.5	16.5
Vacant	30	33	16.1	14.7
Total	205	205	100.0	100.0

Source: Experian Goad for Alton - February 2022, Lichfields' analysis and RMTUS 2018.

- 5.9 As indicated in the RMTUS 2018, the shop vacancy rate increased significantly between 2006 and 2018, primarily due to the recession in 2009. The latest vacancy figures suggest the centre's overall performance has continued to decline steadily.
- 5.10 Despite the recent loss of shops, Alton's proportion of comparison shop units remains broadly consistent with the national average. The decline in comparison goods shops is a general trend seen across most centres in the UK. Comparison goods floorspace in the centre totals 9,020 sq.m gross. Convenience goods floorspace totals 9,720 sq.m, but 58% of this is concentrated within the large Sainsbury's superstore, which acts as an important anchor store for the town centre as a whole.
- 5.11 The centre has a good provision of financial/professional services and other non-retail services, occupying 6,470 sq.m gross. The food/beverage sector is slightly below average, in particular restaurant/café provision. Food/beverage outlets occupy 6,300 sq.m gross.
- 5.12 As in 2018, vacant shop units are generally spread throughout the centre, both within the Primary Shopping Area and more peripheral parts of the centre, as shown in Appendix 5. The Goad Plan indicates vacant ground floorspace totals 3,800 sq.m gross. Most of the vacant units are relatively small (under 150 sq.m gross). There are only 4 vacant units of over 200 sq.m gross.

Retailer representation

- 5.13 Despite shop closures since 2018, Alton town centre still has a reasonable selection of comparison shops (59 units). Table 5.2 provides a breakdown of the comparison shop units by category and compares this to the Goad national average in each category.
- 5.14 All Goad plan comparison shop categories are represented in Alton, apart from the cars/motorcycles /motor accessories, although there is a Kwik Fit outlet in the centre. There is a reasonable choice of outlets in some categories, particularly chemists, drug stores and opticians. The choice in some other categories is more limited with less than 5 outlets in 7 of the 14 comparison goods retail categories.
- 5.15 The highest number of outlets in the clothing and footwear sector has fallen from 11 to 7 units since 2018 and the proportion is now significantly below the national average. There is a high proportion of charity shops.

Table 5.2 Alton - Mix of comparison uses

Type of sales	Number of units 2018	Number of units 2022	% Units 2022	% UK average 2022
Clothing and footwear	11	7	11.9	21.5
Furniture, carpets and textiles	5	7	11.9	7.7
Booksellers, arts, cards and stationers	7	4	6.8	6.1
Electrical, music and photography	5	3	5.1	9.3
DIY, hardware and homeware	5	3	5.1	6.9
China, glass and gifts	1	1	1.7	5.5
Cars, motorcycles, motor accessories	0	0	0	1.3
Chemists, drug stores and opticians	10	9	15.2	12.0
Variety, department and catalogue	1	0	0	1.7
Florists, nurserymen and seedsmen	1	2	3.4	2.2
Toys, hobby, cycle and sports	4	3	5.1	5.5
Jewellers	3	2	3.4	5.1
Charity and second-hand shops	11	10	16.9	10.0
Other comparison retailers	2	8	13.5	5.2
Total	66	59	100.0	100.0

Source: Experian Goad for Alton – February 2022, Lichfields’ analysis and RMTUS 2018

- 5.16 The national multiple retailers are concentrated in the Primary Shopping Area along the central section of the High Street. The number of multiple comparison retailers is reasonable for a centre of Alton’s size and role. The multiple comparison retailers include:

Table 5.3 Alton - national comparison multiples

Boots	M&CO	Specsavers
British Heart Foundation	Oxfam	Superdrug
Cancer Research	Peacocks	Vodafone
Card Factory	Savers	Waterstones
Clarks	Scope	WHSmith

Source: Experian Goad for Alton – February 2022

Service representation

- 5.17 Alton town centre has a good range of non-retail service uses, with a choice of outlets across all the Goad categories, as shown in Table 5.4 below.
- 5.18 As in 2018, the range and choice of non-retail service uses in Alton town centre is reasonable, with most categories comparable or slightly higher than with the national average. There is a reasonable choice of facilities in all categories apart from travel agents, a sector that has declined across the UK in recent years due to the increase in on-line bookings.
- 5.19 The number of restaurant/cafés has increased slightly since 2018 but the proportion of these uses remains below the national average. Nevertheless, the evening economy is also supported by public houses, hotels and the cinema.
- 5.20 The number of estate agents has reduced since 2018 but remains above the national average, but this reduction has been counter-balanced by the increase in hair/beauty salons.

Table 5.4 Alton - Mix of Non-Retail Uses

Type	Number of units 2018	Number of units 2022	Percentage of Units 2022 (%)	UK average 2022 (%)
Restaurants/Cafés	12	16	19.0	24.0
Fast food/takeaways	10	13	15.5	14.9
Pubs/bars	9	8	9.5	11.8
Banks/other financial services	9	10	11.9	8.4
Betting shops/casinos	2	2	2.4	3.8
Estate agents/valuers	11	9	10.7	7.8
Travel agents	3	0	0	1.5
Hairdressers/beauty parlours	18	24	28.6	26.3
Laundrettes/dry cleaners	2	2	2.4	1.7
Total	76	84	100.0	100.0
Other	16	14		
Overall Total	92	98		

Source: Experian Goad for Alton – February 2022, Lichfields’ analysis and RMTUS 2018.

Commercial Rents

- 5.21 According to the Valuation Office Agency (VOA) latest 2021 calculations, Zone A retail rents continue to vary throughout the centre. Along the High Street they vary from £230 per sq.m to over £450 per sq.m. The highest Zone A rent is £472.50 per sq.m. Along Normandy Street and Market Street, Zone A retail rents are lower at £230 per sq.m. and £275-£325 per sq.m, respectively. Turk Street has lower rents at £225 per sq.m.
- 5.22 VOA prime Zone A rents in Alton are still much lower than in larger centres in the sub-region, which indicates Alton is a lower order centre with relatively low rental values. Lower rental values may make commercial development less viable, but increases the affordability of existing premises for tenants.

Characteristics of the shopping area

- 5.23 As a historic market town, Alton has many attractive period buildings. Most of the town centre is within a Conservation Area. The structure of the main shopping area of Alton is linear, stretching for approximately 800 metres along the High Street and Normandy Street. There are commercial uses along several side streets that do not provide a natural circuit for pedestrians e.g. Market Street and Turk Street.
- 5.24 Overall Alton is an attractive shopping destination with a diverse architectural character. Amenities are provided for visitors, including car parks, public toilets, seating, bins, cycle parking and planting. The pedestrianised Market Square/Westbrook Walk area is higher quality than the High Street and contributes to the ambience of the centre and environment.
- 5.25 Pavement widths vary significantly across the centre. Pavements are narrow in Market Street, Lenten Street, Turk Street and the west side of Normandy Street, due to space taken up by on-street parking. Wider pavements in most sections of the High Street assist pedestrian movement, with bollards, street furniture and plant pots.
- 5.26 The quality of pavements also varies, but in most areas is of reasonable or good quality. Paving slabs have been replaced with tarmac in some areas, which undermines the aesthetic quality of the streetscape, but this maintenance issue is not widespread.

- 5.27 High volumes of traffic can make it difficult for pedestrians to cross the road e.g. the mini-roundabout at the junction of High Street/Church Street and Normandy Street is not pedestrian friendly and at busy times can restrict pedestrian movement. To counter these impacts, vehicular traffic along the High Street is now restricted to a 20-mile an hour zone and there are traffic calming pinch-points and ramps that provide pedestrian crossing points. The carriageways are predominantly unattractive tarmac surfaces, with only two small sections of tegular blocks providing a traffic calming/pedestrian friendly surface at the High Street/Market Street/Turk Street junctions. The Market Square, Westbrook Walk and John Trimmer Walk provide the only fully pedestrianised areas in the centre.
- 5.28 Ideally future streetscape materials, street furniture, landscaping and planting could be implemented more consistently across all parts of the town centre.
- 5.29 Over 70% of shop units are small (under 150 sq.m) with narrow frontages. Most of the buildings are two or three storeys in height. Shop fronts/facias in the centre are generally well maintained, although some of the vacant units now have unattractive frontages. The impact of increased shop vacancies to the quality of the streetscape is a concern.

Accessibility and movement

- 5.30 There is a good choice and provision of pay and display car parking in and around the town centre, as shown in Table 5.5. These car parks provide over 700 spaces and are available for long and short stay and some are free on Sundays. There are also on-street spaces along the High Street for a maximum 30 minute stay.

Car Park name/location	Number of spaces
Bank	126
Church Street	19
Lady Place	183
Manor	36
Mount Pleasant	90
Rogers Court	14
Turk Street	163
Vicarage Hill	33
Victoria Road	52
Total	716

- 5.31 The short stay parking costs are £1.00 for one hour; £1.40 for 2 hours and £1.90 for 3 hours. The all day long stay cost is £7.00. The pricing structure encourages customers to stay up to 3 hours. In addition to these public car parks, Sainsbury's provides 360 customer only spaces.
- 5.32 Car parks are reasonably priced and conveniently located close to the main shopping area. However, some of the car parks are relatively small and the provision of spaces is fragmented making it more difficult for customers to find space at peak periods.
- 5.33 Alton town centre is well served by bus routes with 5 bus stops located along the High Street and further stops in Normandy Street, Draymans Way (3 stops) and Lower Turk Street. There are bus services to the surrounding towns, such as Liphook, Petersfield and Whitehill & Bordon, as well as destinations further afield, such Guildford, Farnham and Winchester.

- 5.34 Alton railway station is located within walking distance (about 300 metres) of the north end of the designated town centre. It provides South Western Railway services to surrounding local areas, London Waterloo, Farnham and Woking.

Views of customers

- 5.35 The 2018 household survey results indicated 41% of all respondents had visited Alton for shopping in the last 12 months, which was a relatively high proportion when compared with other centres in the District. These respondents were asked what they like or dislike about shopping in Alton town centre. Around 32% indicated they like the town centre because it is close to home. The next highest was 10% suggesting there is a good choice of supermarkets and 9% suggested there was a good choice of shops in general. In terms of factors disliked, 19% stated that there is not enough choice of independent shops and 12% said there were too many charity shops.

Alton's catchment area

- 5.36 The 2018 household survey results indicated that Alton's attracts the most of its trade from Zone 1, which is Alton's local catchment area. A reasonable level of trade was also attracted from Zone 2 (Whitehill & Bordon), but less trade is attracted from Zones 3 (Liphook) and Zone 4 (Petersfield). The main attractors in the Alton catchment area were Southampton, Winchester and Basingstoke.
- 5.37 Alton is a popular destination for both comparison and convenience goods shopping for residents of Zone 1 (Alton) and is less popular in the other zones, due to the proximity of larger city and town centres outside of East Hampshire District.

Summary and conclusions

- 5.38 The strengths and weaknesses identified in the RMTCUS 2018 have been reviewed and updated. The key changes have been highlighted.

Strengths

- The RMTCUS 2018 indicated Alton had a reasonable selection of shops, in particular a range and choice of independent shops, reflecting the centre's role as one of the two main town centres within the District. In 2022, Alton continues to have a reasonable selection of shops, but the proportion and number of comparison units has reduced. However, the proportion of comparison shops still remains broadly consistent with the national average. The number of multiple comparison retailers is still considered reasonable reflecting Alton's size and role.
- Food and grocery provision in the town centre has been sustained and remains suitable for both main and top up food shopping. The Sainsbury's is an important anchor store. The impact of out of centre food stores i.e. Waitrose and Aldi have not undermined the town centre's food and grocery role. The impact of the proposed out of centre Lidl and Home Bargains stores will need to be monitored, but the retail capacity figures do not suggest a significant adverse impact on this retail sector. The street markets continues to add to the centre's attraction.
- The RMTUCS 2018 noted the range and choice of non-service facilities including banks and building societies was a key strength. In 2022 the provision of banks and other financial services remains higher than the national average. Most non-retail service categories are comparable or slightly higher than the national average. The total number of non-retail services has increased from 92 in 2018 to 98 in 2022. Only the

number of travel agents has reduced significantly. There is a good provision of hair and beauty salons.

- The majority of Alton is located within a designated Conservation Area. The architectural quality of buildings and streetscape remains a strength, although there are areas that could be improved. Generally, Alton continues to be well-maintained with good quality buildings/shop fronts. Notwithstanding the current quality of the shopping environment, ideally future streetscape materials, street furniture, landscaping and planting could be implemented more consistently across all parts of the town centre.
- As in 2018, the centre has reasonably good quality pavements in most areas, which provide a pleasant shopping environment. However, pavements are narrow in some areas, but most areas are well maintained and clean. The provision of street furniture throughout the centre is generally good.
- The overall environmental quality within Alton town centre remains good and most areas are relatively safe. However high volumes of traffic can make it difficult for pedestrians to cross in certain places (see below).
- Alton has a good choice of car parks located conveniently near the main shopping area. The pricing structure encourages short stay trips up to 3 hours, suitable for shopping and leisure trips.

Weaknesses

- The shop vacancy rate (16.1%) has increased since 2018 and is now higher than the national average (14.7%), suggesting the demand for premises has weakened since 2018. The number of vacant units has increased from 30 to 33 units. Vacant units are evident across the centre including the Primary Shopping Area.
- Most of the vacant shop units are small (under 150 sq.m gross) and may not meet the modern space requirements of potential new operators.
- Some vacant units have unattractive shop frontages. A continued increase in long term shop vacancies could undermine the quality of Alton's streetscape.
- The number of comparison good shops has decreased from 66 outlets in 2018 to 59 in 2022. The number of clothing and footwear shops has reduced significantly since 2018. The continuation of this trend is a key threat to the town centre's vitality and viability if alternative uses cannot be attracted.
- As in 2007 and 2018, Alton does not offer the same quality, range and choice of comparison goods facilities available in larger surrounding centres such as Basingstoke, Guildford, Southampton and Winchester, especially clothing and footwear retailers. Alton has a high proportion of charity shops.
- As in 2018, Alton's evening economy continues to be based primarily on restaurants, pubs/hotels and the small independent cinema. The provision of restaurants/café's has improved since 2018 but remains below the national average. The evening economy could still be improved through diversification. The food/beverage floorspace capacity projections and published operator space requirements suggest this sector can be improved in the future, although residential amenity impact issues will need to be considered.
- Despite the higher vacancy rate, there is still a reasonably low supply of modern premises. The provision of modern premises in the historic conservation area remains

limited. However, the increase in vacant shops provides more opportunities for new smaller operators.

- The linear structure of the centre does not encourage shoppers to visit all parts of the town centre during their shopping trip, and pedestrian flows within peripheral areas are low. The linear High Street and narrow pavements in side streets and Normandy Street continues to restrict pedestrian flows in peripheral areas.
- Traffic calming measures such as pinch-points, ramps and tegular block surfaces are provided in limited sections of the High Street. High volumes of traffic can make it difficult for pedestrians to cross the road in certain areas.
- Alton town centre remains heavily reliant on the private car, as indicated by the household survey results in 2018, although bus and rail services are available.

6.0 Conclusions

6.1 The updated review of the Alton suggests the health of the centre has declined since 2018 in terms of the number of comparison goods shops (reduced for 66 to 59 outlet) and the number of vacant shop units (increase from 30 to 33 units). However, the number of non-retail services has increased including restaurants/cafés, hot food takeaways and hair/beauty salons. These changes reflect national trends.

6.2 Table 6.1 summarises the retail, food/beverage and leisure floorspace projections for Alton up to 2031 and 2036. The floorspace projections reflect the implementation of existing retail development commitments in Alton i.e. the Lidl and Home Bargains stores under-construction.

Table 6.1 Summary of floorspace capacity projections up to 2030 and 2036 (sq.m gross) – cumulative

Period	Convenience retail	Comparison retail	Food/beverage	Commercial leisure
2022 to 3031	-770	-855	563	500
2022 to 2036	-585	-688	801	700

6.3 These capacity projections suggests the implementation of commitments will create an over-supply of retail floorspace up to 2036. The negative floorspace projections for convenience goods retail are unlikely to lead to the closure of a food store or an increase in shop vacancies in the town centre, but the main food store operators in Alton are likely to trade slightly below their company average for the foreseeable future. There may be some limited scope for small specialist convenience goods shops in Alton town centre.

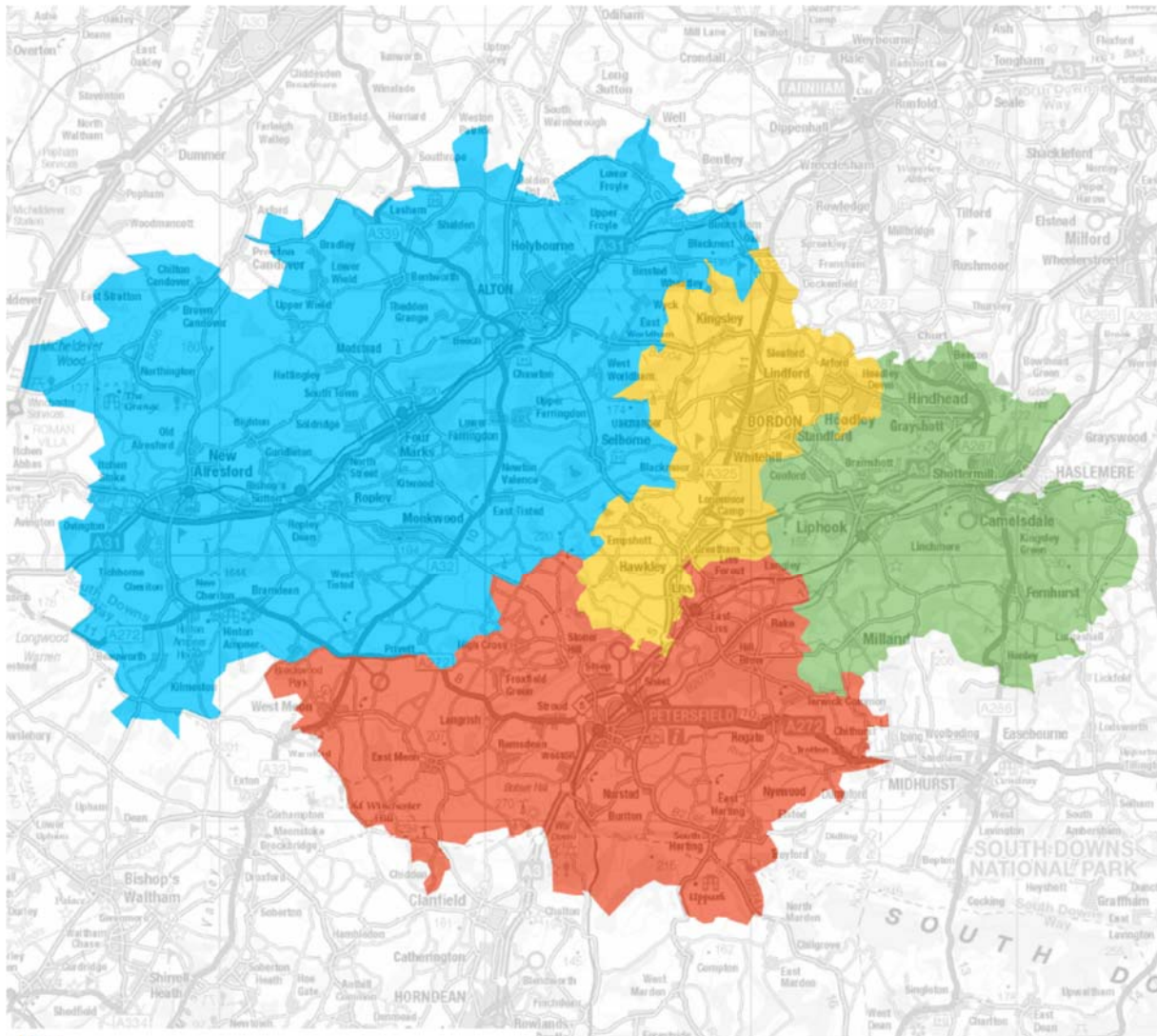
6.4 The negative floorspace projections for comparison goods retail and the gradual decline in the number of comparison goods shops in Alton town centre since 2007 and 2018 suggest there could be more shop closures in the town centre and a possible increase in the number of vacant units. For example, the loss of 688 sq.m gross could result in the loss of 4 to 5 small comparison goods shops in the town centre.

6.5 This potential loss of comparison goods shops could be offset by the growth in the food/beverage and leisure sector, based on the floorspace capacity projections (about 1,500 sq.m gross in 2036). However, the number of vacant shops has increased since 2018 and the vacancy rate is relatively high (16.1% compared with UK average of 14.7%). Vacant shop floorspace in the town centre is 3,800 sq.m gross. Alternative uses for some of this space would benefit the town centre.

6.6 A reduction of the current shop high vacancy rate to around 10% of total units would be desirable in the future to enhance the vitality and viability of the town centre. To achieve this 10% vacancy rate, the reoccupation/repurposing of about 1,500 sq.m gross would be required. In theory vacant floorspace within Alton town centre is sufficient to accommodate growth in the food/beverage and commercial leisure sectors, even if the number of retail outlets does not decline further.

6.7 There should be potential to improve the evening economy including food/beverage uses. There could be potential for an additional health/fitness facility and small scale leisure/cultural innovations. The strategy and policy approach for these non-retail uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

Appendix 1 Alton Study Area



Key

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

Appendix 2 Convenience goods assessment

Table 1 - Study area population

Zone	2022	2026	2031	2036
Zone 1 - Alton	46,459	47,530	48,521	49,276
Zone 2 - Whitehill & Bordon	26,499	27,180	27,894	28,502
Zone 3 - Liphook	31,242	31,825	32,323	32,739
Zone 4 - Petersfield	31,099	31,666	32,209	32,632
Total	135,299	138,201	140,947	143,149

Sources:

*Experian MMG 3***Table 2 - Convenience goods expenditure per person per annum (£)**

Zone	2022	2026	2031	2036
Zone 1 - Alton	2,719	2,701	2,700	2,704
Zone 2 - Whitehill & Bordon	2,494	2,478	2,477	2,481
Zone 3 - Liphook	2,801	2,782	2,781	2,786
Zone 4 - Petersfield	2,739	2,721	2,720	2,725

Sources:

*Experian Local Expenditure 2020 (2020 prices)**Experian recommended growth rates - Retail Planner Briefing Note 19 (January 2022)**Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses***Table 3 - Total convenience goods expenditure (£m)**

Zone	2022	2026	2031	2036
Zone 1 - Alton	126.32	128.38	131.01	133.24
Zone 2 - Whitehill & Bordon	66.09	67.35	69.09	70.71
Zone 3 - Liphook	87.51	88.54	89.89	91.21
Zone 4 - Petersfield	85.18	86.16	87.61	88.92
Study Area Total	365.10	370.43	377.60	384.09

Source: Tables 1 and 2

Table 4 - Base year convenience goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow
Sainsbury's, Draymans Way, Alton	22.5%	10.0%	0.0%	0.2%	5.0%
Marks & Spencer Simply Food, High Street, Alton	2.8%	0.2%	0.0%	0.0%	2.0%
Waitrose, Station Road, Alton	7.3%	2.1%	0.0%	0.0%	5.0%
Iceland, High Street, Alton	1.0%	0.7%	0.0%	0.0%	1.0%
Co-op, High Street, Alton	1.9%	0.0%	0.0%	0.0%	1.0%
Aldi, Alton Retail Park	12.7%	3.0%	0.5%	0.0%	5.0%
Other Alton	1.3%	0.3%	0.0%	0.3%	1.0%
Alton sub-total	49.5%	16.3%	0.5%	0.5%	
Whitehill & Bordon	0.0%	54.4%	5.9%	1.1%	n/a
Liphook	0.3%	10.6%	37.3%	4.6%	n/a
Four Marks	4.7%	0.2%	0.0%	0.0%	n/a
Petersfield	5.6%	2.9%	4.6%	74.6%	n/a
Farnham	2.7%	5.5%	2.4%	0.0%	n/a
Waterlooville	1.7%	0.9%	0.4%	4.3%	n/a
Havant	0.0%	0.0%	0.0%	1.6%	n/a
Winchester	15.8%	0.0%	0.0%	0.3%	n/a
Haslemere	1.3%	1.0%	32.4%	0.3%	n/a
Other	18.4%	8.2%	16.5%	12.7%	n/a
Other sub-total	50.5%	83.7%	99.5%	99.5%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base Year 2022 convenience goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2022	126.32	66.09	87.51	85.18		365.10
Sainsbury's, Draymans Way, Alton	28.42	6.61	0.00	0.17	1.85	37.05
Marks & Spencer Simply Food, High Street, Alton	3.54	0.13	0.00	0.00	0.07	3.74
Waitrose, Station Road, Alton	9.22	1.39	0.00	0.00	0.56	11.17
Iceland, High Street, Alton	1.26	0.46	0.00	0.00	0.02	1.74
Co-op, High Street, Alton	2.40	0.00	0.00	0.00	0.02	2.42
Aldi, Alton Retail Park	16.04	1.98	0.44	0.00	0.97	19.43
Other Alton	1.64	0.20	0.00	0.26	0.02	2.12
Alton sub-total	62.53	10.77	0.44	0.43	3.52	77.69
Whitehill & Bordon	0.00	35.95	5.16	0.94	n/a	42.05
Liphook	0.38	7.01	32.64	3.92	n/a	43.94
Four Marks	5.94	0.13	0.00	0.00	n/a	6.07
Petersfield	7.07	1.92	4.03	63.54	n/a	76.56
Farnham	3.41	3.63	2.10	0.00	n/a	9.15
Waterlooville	2.15	0.59	0.35	3.66	n/a	6.76
Havant	0.00	0.00	0.00	1.36	n/a	1.36
Winchester	19.96	0.00	0.00	0.26	n/a	20.21
Haslemere	1.64	0.66	28.35	0.26	n/a	30.91
Other	23.24	5.42	14.44	10.82	n/a	53.92
Other sub-total	63.79	55.32	87.07	84.75	n/a	290.93
TOTAL	126.32	66.09	87.51	85.18	n/a	368.62

Source: Tables 3 and 4

Table 6 - Future convenience goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow
Alton	55.0%	16.5%	0.6%	0.5%	5.0%
Whitehill & Bordon	0.0%	59.0%	7.7%	1.3%	n/a
Liphook	0.0%	6.0%	35.9%	4.4%	n/a
Four Marks	4.3%	0.2%	0.0%	0.0%	n/a
Petersfield	5.0%	2.9%	4.6%	74.6%	n/a
Farnham	2.6%	5.5%	2.4%	0.0%	n/a
Waterlooville	1.7%	0.9%	0.4%	4.3%	n/a
Havant	0.0%	0.0%	0.0%	1.6%	n/a
Winchester	14.0%	0.0%	0.0%	0.3%	n/a
Haslemere	1.2%	1.0%	32.2%	0.3%	n/a
Other	18.2%	8.0%	16.2%	12.7%	n/a
TOTAL	102.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results) with Lichfields' adjustments.

Table 7 - Future 2026 convenience goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2026	128.38	67.35	88.54	86.16		370.43
Alton	70.61	11.11	0.53	0.43	4.35	87.04
Whitehill & Bordon	0.00	39.74	6.82	1.12	n/a	47.68
Liphook	0.00	4.04	31.78	3.79	n/a	39.62
Four Marks	5.52	0.13	0.00	0.00	n/a	5.65
Petersfield	6.42	1.95	4.07	64.28	n/a	76.72
Farnham	3.34	3.70	2.12	0.00	n/a	9.17
Waterlooville	2.18	0.61	0.35	3.71	n/a	6.85
Havant	0.00	0.00	0.00	1.38	n/a	1.38
Winchester	17.97	0.00	0.00	0.26	n/a	18.23
Haslemere	1.54	0.67	28.51	0.26	n/a	30.98
Other	23.36	5.39	14.34	10.94	n/a	54.04
TOTAL	130.95	67.35	88.54	86.16	n/a	377.35

Source: Tables 3 and 6

Table 8 - Future 2031 convenience goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2031	131.01	69.09	89.89	87.61		377.60
Alton	72.05	11.40	0.54	0.44	4.44	88.88
Whitehill & Bordon	0.00	40.77	6.92	1.14	n/a	48.83
Liphook	0.00	4.15	32.27	3.85	n/a	40.27
Four Marks	5.63	0.14	0.00	0.00	n/a	5.77
Petersfield	6.55	2.00	4.13	65.36	n/a	78.04
Farnham	3.41	3.80	2.16	0.00	n/a	9.36
Waterlooville	2.23	0.62	0.36	3.77	n/a	6.98
Havant	0.00	0.00	0.00	1.40	n/a	1.40
Winchester	18.34	0.00	0.00	0.26	n/a	18.60
Haslemere	1.57	0.69	28.94	0.26	n/a	31.47
Other	23.84	5.53	14.56	11.13	n/a	55.06
TOTAL	133.63	69.09	89.89	87.61	n/a	384.66

Source: Tables 3 and 6

Table 9 - Future 2036 convenience goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2036	133.24	70.71	91.21	88.92		384.09
Alton	73.28	11.67	0.55	0.44	4.52	90.47
Whitehill & Bordon	0.00	41.72	7.02	1.16	n/a	49.90
Liphook	0.00	4.24	32.74	3.91	n/a	40.90
Four Marks	5.73	0.14	0.00	0.00	n/a	5.87
Petersfield	6.66	2.05	4.20	66.34	n/a	79.24
Farnham	3.46	3.89	2.19	0.00	n/a	9.54
Waterlooville	2.27	0.64	0.36	3.82	n/a	7.09
Havant	0.00	0.00	0.00	1.42	n/a	1.42
Winchester	18.65	0.00	0.00	0.27	n/a	18.92
Haslemere	1.60	0.71	29.37	0.27	n/a	31.94
Other	24.25	5.66	14.78	11.29	n/a	55.98
TOTAL	135.91	70.71	91.21	88.92	n/a	391.28

Source: Tables 3 and 6

Table 10 - Convenience goods floorspace and benchmark turnover in Alton (2020 prices)

Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Existing					
Sainsbury's, Draymans Way	3,318	70%	2,323	£12,482	£28.99
Marks & Spencer Simply Food, High St.	1,077	80%	862	£11,095	£9.56
Waitrose, Station Road	1,557	90%	1,401	£14,740	£20.66
Iceland, High Street	729	98%	714	£7,447	£5.32
Co-op, High Street	157	95%	149	£10,990	£1.64
Tesco Express, Anstey Lane	141	95%	134	£14,075	£1.89
Aldi, Alton Retail Park	968	80%	774	£11,020	£8.53
Other Alton	800	100%	800	£6,000	£4.80
Sub-total	8,747		7,157		£81.38
Proposed					
Lidl, Mill Lane Retail Park	1,308	80%	1,046	£8,741	£9.15
Home Bargains, Mill Lane Retail Park	1,255	45%	565	£5,272	£2.98
TOTAL	11,310		8,769		£93.51

Source: Alton Experian Goad Plan February 2022, ORC Storepoint 2022 and GlobalData 2021

Table 11 - Convenience goods floorspace capacity projections 2022 to 2036 (£M)

	2022	2026	2031	2036
Available expenditure	77.69	87.04	88.88	90.47
Benchmark turnover of existing facilities	81.38	82.93	83.10	83.10
Benchmark turnover of proposed facilities	12.12	12.35	12.38	12.38
Total	93.51	95.29	95.48	95.48
Expenditure surplus/deficit	-15.82	-8.25	-6.60	-5.01
Turnover density (£ per sq.m net)	12,000	12229	12253	12253
Floorspace projection (sq.m net)	-1,319	-675	-539	-409
Floorspace Projection (sq.m gross)	-1,884	-964	-770	-585

Source: Tables 5 to 10

Appendix 3 Comparison goods assessment

Table 1 - Study area population

	2022	2026	2031	2036
Zone 1 - Alton	46,459	47,530	48,521	49,276
Zone 2 - Whitehill & Bordon	26,499	27,180	27,894	28,502
Zone 3 - Liphook	31,242	31,825	32,323	32,739
Zone 4 - Petersfield	31,099	31,666	32,209	32,632
Total	135,299	138,201	140,947	143,149

Sources: *Experian MMG 3*

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

	2022	2026	2031	2036
Zone 1 - Alton	3,900	4,195	4,705	5,352
Zone 2 - Whitehill & Bordon	3,478	3,741	4,196	4,773
Zone 3 - Liphook	4,089	4,398	4,933	5,611
Zone 4 - Petersfield	3,841	4,131	4,634	5,271

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian recommended growth rates - Retail Planner Briefing Note 19 (January 2022)
Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total comparison goods expenditure (£m)

	2022	2026	2031	2036
Zone 1 - Alton	181.19	199.39	228.29	263.73
Zone 2 - Whitehill & Bordon	92.16	101.68	117.04	136.04
Zone 3 - Liphook	127.75	139.97	159.45	183.70
Zone 4 - Petersfield	119.45	130.81	149.26	172.00
Study Area Total	520.55	571.85	654.04	755.47

Table 4 - Base year comparison goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow
Alton	18.7%	5.3%	0.5%	0.4%	10.0%
Whitehill & Bordon	0.5%	9.8%	1.2%	0.2%	n/a
Liphook	0.0%	2.0%	9.2%	0.5%	n/a
Petersfield	1.4%	6.7%	11.6%	40.3%	n/a
Chichester	0.4%	2.0%	6.5%	6.7%	n/a
Guildford	2.6%	20.9%	31.7%	6.2%	n/a
Farnham	2.8%	7.9%	1.6%	0.3%	n/a
Waterlooville	0.5%	3.8%	1.2%	8.5%	n/a
Havant	0.0%	1.1%	1.1%	5.8%	n/a
Southampton	10.2%	0.2%	1.3%	4.7%	n/a
Portsmouth	1.5%	6.2%	6.4%	14.7%	n/a
Winchester	28.8%	0.0%	0.0%	5.0%	n/a
Aldershot	0.0%	1.6%	0.6%	0.0%	n/a
Basingstoke	23.5%	14.0%	1.1%	0.5%	n/a
Haslemere	0.2%	2.8%	15.2%	0.5%	n/a
Other	8.9%	15.7%	10.8%	5.7%	n/a
Other Total	81.3%	94.7%	99.5%	99.6%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base year 2022 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2022	181.19	92.16	127.75	119.45		520.55
Alton	33.88	4.88	0.64	0.48	4.43	44.32
Whitehill & Bordon	0.91	9.03	1.53	0.24	n/a	11.71
Liphook	0.00	1.84	11.75	0.60	n/a	14.19
Petersfield	2.54	6.17	14.82	48.14	n/a	71.67
Chichester	0.72	1.84	8.30	8.00	n/a	18.87
Guildford	4.71	19.26	40.50	7.41	n/a	71.88
Farnham	5.07	7.28	2.04	0.36	n/a	14.76
Waterlooville	0.91	3.50	1.53	10.15	n/a	16.09
Havant	0.00	1.01	1.41	6.93	n/a	9.35
Southampton	18.48	0.18	1.66	5.61	n/a	25.94
Portsmouth	2.72	5.71	8.18	17.56	n/a	34.17
Winchester	52.18	0.00	0.00	5.97	n/a	58.16
Aldershot	0.00	1.47	0.77	0.00	n/a	2.24
Basingstoke	42.58	12.90	1.41	0.60	n/a	57.49
Haslemere	0.36	2.58	19.42	0.60	n/a	22.96
Other	16.13	14.47	13.80	6.81	n/a	51.20
Other Total	147.31	87.28	127.11	118.97	n/a	480.67
TOTAL	181.19	92.16	127.75	119.45	n/a	524.98

Source: Tables 3 and 4

Table 6 - Future 2026 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2026	199.39	101.68	139.97	130.81		571.85
Alton	37.29	5.39	0.70	0.52	4.88	48.78
Whitehill & Bordon	1.00	9.96	1.68	0.26	n/a	12.90
Liphook	0.00	2.03	12.88	0.65	n/a	15.56
Petersfield	2.79	6.81	16.24	52.72	n/a	78.56
Chichester	0.80	2.03	9.10	8.76	n/a	20.69
Guildford	5.18	21.25	44.37	8.11	n/a	78.91
Farnham	5.58	8.03	2.24	0.39	n/a	16.25
Waterlooville	1.00	3.86	1.68	11.12	n/a	17.66
Havant	0.00	1.12	1.54	7.59	n/a	10.25
Southampton	20.34	0.20	1.82	6.15	n/a	28.51
Portsmouth	2.99	6.30	8.96	19.23	n/a	37.48
Winchester	57.42	0.00	0.00	6.54	n/a	63.96
Aldershot	0.00	1.63	0.84	0.00	n/a	2.47
Basingstoke	46.86	14.24	1.54	0.65	n/a	63.29
Haslemere	0.40	2.85	21.27	0.65	n/a	25.17
Other	17.75	15.96	15.12	7.46	n/a	56.28
Other Total	162.10	96.29	139.27	130.29	n/a	527.95
TOTAL	199.39	101.68	139.97	130.81	n/a	576.72

Source: Tables 3 and 4

Table 7 - Future 2031 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2031	228.29	117.04	159.45	149.26		654.04
Alton	42.69	6.20	0.80	0.60	5.59	55.88
Whitehill & Bordon	1.14	11.47	1.91	0.30	n/a	14.82
Liphook	0.00	2.34	14.67	0.75	n/a	17.76
Petersfield	3.20	7.84	18.50	60.15	n/a	89.68
Chichester	0.91	2.34	10.36	10.00	n/a	23.62
Guildford	5.94	24.46	50.55	9.25	n/a	90.20
Farnham	6.39	9.25	2.55	0.45	n/a	18.64
Waterlooville	1.14	4.45	1.91	12.69	n/a	20.19
Havant	0.00	1.29	1.75	8.66	n/a	11.70
Southampton	23.29	0.23	2.07	7.02	n/a	32.61
Portsmouth	3.42	7.26	10.20	21.94	n/a	42.83
Winchester	65.75	0.00	0.00	7.46	n/a	73.21
Aldershot	0.00	1.87	0.96	0.00	n/a	2.83
Basingstoke	53.65	16.39	1.75	0.75	n/a	72.53
Haslemere	0.46	3.28	24.24	0.75	n/a	28.72
Other	20.32	18.38	17.22	8.51	n/a	64.42
Other Total	185.60	110.84	158.65	148.66	n/a	603.75
TOTAL	228.29	117.04	159.45	149.26	n/a	659.63

Source: Tables 3 and 4

Table 8 - Future 2036 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2036	263.73	136.04	183.70	172.00		755.47
Alton	49.32	7.21	0.92	0.69	6.46	64.59
Whitehill & Bordon	1.32	13.33	2.20	0.34	n/a	17.20
Liphook	0.00	2.72	16.90	0.86	n/a	20.48
Petersfield	3.69	9.11	21.31	69.32	n/a	103.43
Chichester	1.05	2.72	11.94	11.52	n/a	27.24
Guildford	6.86	28.43	58.23	10.66	n/a	104.19
Farnham	7.38	10.75	2.94	0.52	n/a	21.59
Waterlooville	1.32	5.17	2.20	14.62	n/a	23.31
Havant	0.00	1.50	2.02	9.98	n/a	13.49
Southampton	26.90	0.27	2.39	8.08	n/a	37.64
Portsmouth	3.96	8.43	11.76	25.28	n/a	49.43
Winchester	75.95	0.00	0.00	8.60	n/a	84.55
Aldershot	0.00	2.18	1.10	0.00	n/a	3.28
Basingstoke	61.98	19.05	2.02	0.86	n/a	83.90
Haslemere	0.53	3.81	27.92	0.86	n/a	33.12
Other	23.47	21.36	19.84	9.80	n/a	74.47
Other Total	214.41	128.83	182.78	171.32	n/a	697.33
TOTAL	263.73	136.04	183.70	172.00	n/a	761.93

Source: Tables 3 and 4

Table 9 - Comparison goods sales floorspace in Alton

	Gross floorspace sq.m	Sales floorspace sq.m net
Alton town centre comparison shops	9,020	5,863
Alton food stores	n/a	1,590
Alton retail warehouses	3,360	2,520
Lidl (proposed)	n/a	262
Home Bargains (proposed)	n/a	690
TOTAL	12,380	10,925

Source: Alton Goad Plan February 2022

VOA, Completely Retail and planning application details

Table 10 - Comparison goods floorspace capacity projections 2022 to 2036 (£M)

	2022	2026	2031	2036
Available expenditure	44.32	48.78	55.88	64.59
Turnover of existing facilities	44.32	48.39	54.59	62.07
Turnover of proposed facilities (1) (2)	4.89	5.34	6.02	6.85
Total turnover	49.21	53.73	60.62	68.92
Expenditure surplus/deficit	-4.89	-4.96	-4.74	-4.32
Turnover density (£ per sq.m net)	6,000	6,552	7,391	8,404
Floorspace projection (sq.m net)	-815	-757	-641	-515
Floorspace Projection (sq.m gross)	-1,087	-1,009	-855	-686

Source: Tables 5 to 9

(1) Lidl store comparison goods turnover is £1.25 million (262 sq.m net @£4,789 psm)

(2) Home Bargains store comparison goods turnover is £3.64 million (690 sq.m net @£5,272 psm)

Appendix 4 Food/beverage assessment

Table 1 - Study area population

	2022	2026	2031	2036
Zone 1 - Alton	46,459	47,530	48,521	49,276
Zone 2 - Whitehill & Bordon	26,499	27,180	27,894	28,502
Zone 3 - Liphook	31,242	31,825	32,323	32,739
Zone 4 - Petersfield	31,099	31,666	32,209	32,632
Total	135,299	138,201	140,947	143,149

Sources: *Experian MMG 3*

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

Zone	2022	2026	2031	2036
Zone 1 - Alton	1,611	1,682	1,766	1,846
Zone 2 - Whitehill & Bordon	1,442	1,505	1,580	1,652
Zone 3 - Liphook	1,750	1,827	1,918	2,006
Zone 4 - Petersfield	1,442	1,505	1,580	1,652

Sources:
Experian Local Expenditure 2020 (2020 prices)
Experian recommended leisure expenditure growth rates - Retail Planner Briefing Note 19 (January 2022)

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

	2022	2026	2031	2036
Zone 1 - Alton	74.85	79.92	85.67	90.98
Zone 2 - Whitehill & Bordon	38.20	40.90	44.07	47.09
Zone 3 - Liphook	54.68	58.14	62.00	65.67
Zone 4 - Petersfield	44.83	47.65	50.89	53.92
Total	212.57	226.60	242.62	257.66

Source: *Tables 1 and 2*

Table 4 - Base year food/beverage market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Inflow
Alton	34.7%	10.6%	0.4%	0.0%	5.0%
Whitehill & Bordon	0.0%	9.2%	0.0%	0.0%	1.0%
Liphook	0.0%	4.8%	13.9%	0.6%	1.0%
Petersfield	4.2%	3.7%	7.8%	74.8%	n/a
Chichester	0.0%	1.3%	3.2%	0.5%	n/a
Guildford	0.0%	1.1%	8.1%	2.6%	n/a
Farnham	3.9%	9.8%	1.8%	0.0%	n/a
Waterlooville	0.0%	0.9%	0.0%	0.0%	n/a
Havant	0.0%	0.0%	0.8%	2.0%	n/a
Portsmouth	0.0%	2.0%	13.5%	3.5%	n/a
Winchester	18.0%	1.7%	0.0%	0.9%	n/a
Aldershot	0.0%	3.3%	0.0%	0.0%	n/a
Basingstoke	5.8%	7.7%	0.0%	0.0%	n/a
Haslemere	0.0%	6.2%	16.6%	0.0%	n/a
Liss	0.0%	3.3%	1.1%	7.0%	n/a
Alresford	17.8%	0.0%	0.0%	0.0%	n/a
Other	15.6%	34.4%	32.8%	8.1%	n/a
Other sub-total	65.3%	89.4%	99.6%	100.0%	
TOTAL	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2018 (weighted results)

Table 5 - Base year 2022 food/beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2022	74.85	38.20	54.68	44.83		212.57
Alton	25.97	4.05	0.22	0.00	1.59	31.83
Whitehill & Bordon	0.00	3.51	0.00	0.00	n/a	3.51
Liphook	0.00	1.83	7.60	0.27	n/a	9.70
Petersfield	3.14	1.41	4.27	33.54	n/a	42.36
Chichester	0.00	0.50	1.75	0.22	n/a	2.47
Guildford	0.00	0.42	4.43	1.17	n/a	6.02
Farnham	2.92	3.74	0.98	0.00	n/a	7.65
Waterlooville	0.00	0.34	0.00	0.00	n/a	0.34
Havant	0.00	0.00	0.44	0.90	n/a	1.33
Portsmouth	0.00	0.76	7.38	1.57	n/a	9.72
Winchester	13.47	0.65	0.00	0.40	n/a	14.53
Aldershot	0.00	1.26	0.00	0.00	n/a	1.26
Basingstoke	4.34	2.94	0.00	0.00	n/a	7.28
Haslemere	0.00	2.37	9.08	0.00	n/a	11.45
Liss	0.00	1.26	0.60	3.14	n/a	5.00
Alresford	13.32	0.00	0.00	0.00	n/a	13.32
Other	11.68	13.14	17.94	3.63	n/a	46.39
Other sub-total	48.88	34.15	54.46	44.83	n/a	182.33
TOTAL	74.85	38.20	54.68	44.83	n/a	214.16

Source: Tables 3 and 4

Table 6 - Future 2026 food/beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2026	79.92	40.90	58.14	47.65		226.60
Alton	27.73	4.34	0.23	0.00	1.70	34.00
Whitehill & Bordon	0.00	3.76	0.00	0.00	n/a	3.76
Liphook	0.00	1.96	8.08	0.29	n/a	10.33
Petersfield	3.36	1.51	4.53	35.64	n/a	45.04
Chichester	0.00	0.53	1.86	0.24	n/a	2.63
Guildford	0.00	0.45	4.71	1.24	n/a	6.40
Farnham	3.12	4.01	1.05	0.00	n/a	8.17
Waterlooville	0.00	0.37	0.00	0.00	n/a	0.37
Havant	0.00	0.00	0.47	0.95	n/a	1.42
Portsmouth	0.00	0.82	7.85	1.67	n/a	10.33
Winchester	14.39	0.70	0.00	0.43	n/a	15.51
Aldershot	0.00	1.35	0.00	0.00	n/a	1.35
Basingstoke	4.64	3.15	0.00	0.00	n/a	7.78
Haslemere	0.00	2.54	9.65	0.00	n/a	12.19
Liss	0.00	1.35	0.64	3.34	n/a	5.32
Alresford	14.23	0.00	0.00	0.00	n/a	14.23
Other	12.47	14.07	19.07	3.86	n/a	49.46
Other sub-total	52.19	36.56	57.90	47.65	n/a	194.30
TOTAL	79.92	40.90	58.14	47.65	n/a	228.30

Source: Tables 3 and 4

Table 7 - Future 2031 food/beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2031	85.67	44.07	62.00	50.89		242.62
Alton	29.73	4.67	0.25	0.00	1.82	36.47
Whitehill & Bordon	0.00	4.05	0.00	0.00	n/a	4.05
Liphook	0.00	2.12	8.62	0.31	n/a	11.04
Petersfield	3.60	1.63	4.84	38.06	n/a	48.13
Chichester	0.00	0.57	1.98	0.25	n/a	2.81
Guildford	0.00	0.48	5.02	1.32	n/a	6.83
Farnham	3.34	4.32	1.12	0.00	n/a	8.78
Waterlooville	0.00	0.40	0.00	0.00	n/a	0.40
Havant	0.00	0.00	0.50	1.02	n/a	1.51
Portsmouth	0.00	0.88	8.37	1.78	n/a	11.03
Winchester	15.42	0.75	0.00	0.46	n/a	16.63
Aldershot	0.00	1.45	0.00	0.00	n/a	1.45
Basingstoke	4.97	3.39	0.00	0.00	n/a	8.36
Haslemere	0.00	2.73	10.29	0.00	n/a	13.02
Liss	0.00	1.45	0.68	3.56	n/a	5.70
Alresford	15.25	0.00	0.00	0.00	n/a	15.25
Other	13.36	15.16	20.34	4.12	n/a	52.98
Other sub-total	55.94	39.40	61.75	50.89	n/a	207.97
TOTAL	85.67	44.07	62.00	50.89	n/a	244.44

Source: Tables 3 and 4

Table 8 - Future 2036 food/beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
Expenditure 2036	90.98	47.09	65.67	53.92		257.66
Alton	31.57	4.99	0.26	0.00	1.94	38.76
Whitehill & Bordon	0.00	4.33	0.00	0.00	n/a	4.33
Liphook	0.00	2.26	9.13	0.32	n/a	11.71
Petersfield	3.82	1.74	5.12	40.33	n/a	51.02
Chichester	0.00	0.61	2.10	0.27	n/a	2.98
Guildford	0.00	0.52	5.32	1.40	n/a	7.24
Farnham	3.55	4.62	1.18	0.00	n/a	9.35
Waterlooville	0.00	0.42	0.00	0.00	n/a	0.42
Havant	0.00	0.00	0.53	1.08	n/a	1.60
Portsmouth	0.00	0.94	8.87	1.89	n/a	11.69
Winchester	16.38	0.80	0.00	0.49	n/a	17.66
Aldershot	0.00	1.55	0.00	0.00	n/a	1.55
Basingstoke	5.28	3.63	0.00	0.00	n/a	8.90
Haslemere	0.00	2.92	10.90	0.00	n/a	13.82
Liss	0.00	1.55	0.72	3.77	n/a	6.05
Alresford	16.20	0.00	0.00	0.00	n/a	16.20
Other	14.19	16.20	21.54	4.37	n/a	56.30
Other sub-total	59.41	42.10	65.41	53.92	n/a	220.84
TOTAL	90.98	47.09	65.67	53.92	n/a	259.60

Source: Tables 3 and 4

Table 9 - Food and beverage facilities in Alton town centre

	Restaurants	Cafés/coffee shops	Pubs/bars	Takeaways	Total
Number of outlets	9	7	8	13	37
Floorspace sq.m gross	2,160	760	2,080	1,300	6,300

Source: Alton Goad Plan 2022 and Lichfields' analysis.

Table 10 - Food/beverage floorspace capacity projections 2022 to 2036 (£M)

	2022	2026	2031	2036
Available expenditure (£M)	31.83	34.00	36.47	38.76
Turnover of existing facilities	31.83	32.47	33.29	34.14
Expenditure surplus (£M)	0.00	1.53	3.17	4.63
Turnover density (£ per sq.m gross)	5,386	5,495	5,633	5,776
Floorspace projection (sq.m gross)	0	278	563	801

Source: Tables 5 to 9

Appendix 5 Goad Plan – vacant units

Alton Town Centre – Location of vacant units (February 2022)



Celebrating
60
years

Birmingham
0121 713 1530
birmingham@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Cardiff
029 2043 5880
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