Wellesley

ALDERSHOT

RETAIL IMPACT ASSESSMENT

DECEMBER 2012

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Contents

1. Introduction

1.1. This Retail Assessment supports a 'hybrid' planning application submitted by Grainger plc (the 'applicant') to Rushmoor Borough Council (RBC) for the development of land at Wellesley, Aldershot, known as the Aldershot Urban Extension.

1.2. The Wellesley development comprises the redevelopment of the former Ministry of Defence (MoD) land to the north of Aldershot. The scheme will provide a new urban extension, consisting of up to 3,850 new homes with associated physical and social infrastructure that will ensure the creation of a new vibrant and sustainable community for Aldershot.

1.3. The application site is identified in the adopted Rushmoor 'Core Strategy' (October 2011) to deliver around 4,250 new homes between 2014 and 2017. Various social, physical and community infrastructure is required for the site. The Core Strategy requires the delivery of a Local Neighbourhood Centre to include small scale retail, services and food and drink facilitates to support the needs of the emerging new community and to ensure that the development is sustainable.

1.4. Taking into account the Local Planning Authorities (LPAs) objectives for the site and the work undertaken by the appointed project team, this planning application proposes the redevelopment of the site for a mixed use development.

1.5. We have engaged with the Council and their retail consultants, NLP, throughout the preparation of this assessment, through various meetings and email correspondence. We have agreed the scoping of the assessment and also much of the content, which is discussed further throughout the document.

1.6. The purpose of this Retail Assessment is to address the retail policy requirements of the National Planning Policy Framework (NPPF) and the Rushmoor Plan Core Strategy, relevant saved policies from the Rushmoor Local Plan Review and Aldershot Urban Extension SPD. Reference is also made to the Department of Communities & Local Government Practice Guidance on Need, Impact and the Sequential Approach published in December 2009.

1.7. The report provides details of the application site in Section 2 and the proposed development in Section 3. It then identifies the planning policy context on a national, regional and local level (focusing on retail policy) in Section 4, and reviews the Rushmoor Borough Council's Retail and Leisure Study 2010 by DPP in Section 5. The report then assesses the health of Aldershot town centre and North Camp district centre at Section 6. It provides the methodology for the retail assessment in Section 7 and both a qualitative and quantitative assessment of the likely impacts of the proposed development in Section 8, and the sequential approach in Section 9. Our summary and conclusions are then set out in Section 10.

2. Site Description & Surrounding Area

2.1. The Wellesley site comprises approximately 255 hectares (ha) (including 110 hectares of 'Suitable Alternative Natural Green Space') and is an allocated site within the Rushmoor Core Strategy. The site is bounded by the Basingstoke Canal and Alison's Road to the north, Thornhill Road and the military cemetery to the east, military family housing and the Aldershot town centre to the south, and sports pitches to the west of the A325 Farnborough Road. The site is located entirely within the boundary of Rushmoor Borough Council.

2.2. The application site is currently in the ownership of the MoD with much of the site being used for military purposes including office, storage, technical uses, parking of vehicles, sports pitches, and parade grounds. Aldershot has for many years been home to the British Army, but the site is currently going through a process of consolidation which will enable the MoD to dispose of the application site in phases. There are currently elements of the site no longer being used by the MoD which have been released for redevelopment in accordance with planning policy for the area.

3. Proposed Development

3.1. The planning application is a part full and part outline application, known as a 'hybrid' application. The component plan (**Appendix A**) defines the relevant site area covered by each aspect of the planning application, and is referenced as A, B and C (see description below).

3.2. This retail assessment accompanies a 'Hybrid' planning application submitted by Grainger plc (hereafter known as the 'Applicant') to Rushmoor Borough Council (RBC) for the development of land within Aldershot known as the Aldershot Urban Extension (AUE), hereafter referred to as 'Wellesley'. The Applicant seeks outline planning permission for residential development of up to 3,850 dwellings with associated infrastructure including access, and Maida Zone - Phase 1 detail for 235 dwellings at Wellesley (the Hybrid Application). This retail assessment should be read in conjunction with the corresponding application forms and drawings, along with the suite of documents that support this Hybrid Application. For further details on the Hybrid Application please refer to the Planning Statement.

3.3. As part of the submission package some plans are for approval, whilst others are for information/illustrative purposes only. Plans that are not for approval are clearly labelled 'illustrative' or 'for information'. All other plans should be determined by the LPA as application drawings. The illustrative masterplan is one way of interpreting the site against the opportunities and constraints identified and tested in the parameter plans. The parameter plans are for approval. Detailed proposals, following consent granted pursuant to the Hybrid Application, will be submitted to RBC in accordance with the Development Zones identified by the Applicant, as one or more Reserved Matters Application per Development Zone, which will include Listed Building Applications and Conservation Area Applications as appropriate.

3.4. Full details of the application content are provided in the separate 1APP application checklist appended to the accompanying Planning Statement. However, it is proposed that the Local Neighbourhood Centre will consist of the following:

- New Retail Unit (moderate sized foodstore) – 1,400 sq m gross
- Additional Retail Units in Local Centre – 1,560 sq m gross
- Additional retail within site boundary: 185 sq m gross (REME site)

  Plus:
- Office space – 3,180 sq m
- Public House/Restaurant – 610 sq m
- Nursery/Day Care Centre – 330 sq m

4. Planning Policy Context

4.1. The relevant national, regional and local retail planning policies and guidance are discussed within this section. An assessment of the proposals takes into account these key policies in accordance with the provisions of the Planning and Compulsory Purchase Act 2004 (as Amended), Section 38(6) which states that the determination of planning applications should be made in accordance with the development plan unless material considerations indicate otherwise.

4.2. The development plan comprises of the Regional Spatial Strategy for the South East (May 2009), the Rushmoor Plan ‘Core Strategy’ adopted in October 2011 and the ‘saved’ policies of the Rushmoor Local Plan adopted in August 2000.

National Planning Policy Framework

4.3. The NPPF was published in March 2012. The statement includes a ministerial forward by Greg Clarke that explains that “Sustainable means ensuring that better lives for ourselves don’t mean worse lives for future generations”, and that, “Sustainable development is about change for the better, and not only in our built environment.”

4.4. The statement emphasises the presumption in favour of sustainable development. The presumption is to apply “unless the adverse impacts of allowing development would significantly and demonstrably outweigh the benefits” (Paragraph 14). To benefit from the presumption, the benefits of the development must outweigh any significant and demonstrable adverse impacts.

4.5. An impact assessment is required for retail development outside of town centres which are not in accordance with an up to date Local Plan (Paragraph 26). Such impact assessments should assess the impact on existing committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and town centre vitality and viability, including local consumer choice and trade in the town centre and wider area (Paragraph 26).

4.6. A sequential assessment is required for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan.

Regional Planning Guidance

4.7. The Regional Strategy is the South East Plan (May 2009) (SEP). Aldershot falls within the Western Corridor and Blackwater Valley sub regional strategy area of the SEP. Policy TC1 identifies Aldershot as a Secondary Regional Centre. Policy WCBV3 allocates a total of 6,200 new homes to be delivered for Rushmoor over the Plan period 2006 to 2026.

4.8. Within the Footnotes to policy WCBV3 the SEP states that in the event of the Aldershot Urban Extension in Rushmoor not being released for the delivery of 4,500 dwellings, there is no expectation that equivalent land in the Borough or elsewhere will be allocated to meet the overall district figure.

Rushmoor Plan 'Core Strategy' October 2011

4.9. The Core Strategy sets out strategic policies to guide development and land use across the borough until 2027. The objectives of the Core Strategy focus on delivering the Aldershot Urban Extension in Policy SP1 as an allocated site. The development criterion under Policy SP1 includes the provision of a Local Neighbourhood Centre including local retail within a mix of Use Classes A1, A2 A3, A4 and A5.

Rushmoor Local Plan Review 'Saved Policies', 2000

4.10. A review of the saved policies from the Rushmoor Local Plan Review has been completed and there are no relevant retail policies that apply to the proposed development.

Aldershot Urban Extension SPD, March 2009

4.11. The Aldershot Urban Extension SPD was produced to guide development at the Aldershot Urban Extension in the absence of specific planning policy for the site through the development plan document.

4.12. The Aldershot Urban Extension SPD is intended to provide clear guidance from the local authority in terms of delivering quality and commitment for the Aldershot Urban Extension. Whilst these guiding principles are material considerations to any planning application for the site the document is not intended to be prescriptive. It is the adopted Core Strategy and Local Plan Saved Policies that set the policy criteria for the proposal.

4.13. As part of the vision and masterplan principles within the Aldershot Urban Extension SPD, Principle SN6 includes the provision of a Local Neighbourhood Centre, which accommodates a range of retail (subject to a retail impact assessment), as well as leisure, service and business space. Paragraph 5.2.2 identifies that an acceptable scale of floorspace within the local centre would include 3,000 to 6,000 sq. metres gross of retail, services and food and drink space within Use Classes A1, A2, A3, A4, and A5. The range of facilities should include but not be restricted to the following retail uses:

- Foodstore
- Newsagent
- Chemist
- Florist
- Post Office
- Hairdressers

5. Review of the Council's Retail and Leisure Study

5.1. A review of the Council's Retail and Leisure Study has been undertaken to establish the background for the retail requirement in Aldershot and in particular recommendations or assumptions made about the Wellesley scheme. DPP were commissioned by Rushmoor Borough Council to prepare a retail and leisure study in 2010. The aim of the study was to provide a strategy for retail development to support the Rushmoor Local Development Framework.

5.2. The study included an assessment of retail capacity and an analysis of the two main retail centres within the Borough which are Aldershot and Farnborough, and also the district centre at North Camp. A summary of the main findings from the retail study are provided below.

Rushmoor Retail and Leisure Study 2010

5.3. The quantitative analysis is based on a study area which is broken down into zones based on postcode boundaries which led to there being 7 zones as follows:

- 1 – Farnborough
- 2 – Aldershot
- 3 - Ash/Deepcut/Brookwood
- 4 - Farnham, 5 – Fleet
- 6 - Blackwater/Yateley
- 7 – Frimley

5.4. A household shopper survey was undertaken in May 2010 which is used to identify existing shopping patterns within the study area.

Main Food Shopping

5.5. The results of the household survey identified that in Aldershot (Zone 2) 55.9% of households currently do their main food shopping at Tesco, however, a large number of households are shopping outside of Zone 2 with 22.5% completing their main food shopping at Sainsbury's in Farnham, and 7.8% respondents shopping at Asda in Farnborough.

Top-Up Shopping

5.6. In terms of top-up food shopping, 74.6% of respondents in the household survey confirmed they do top-up food shopping between main food shopping trips. Local shops accounted for 17.4% of top-up shopping trips with the larger food shops equating to 37.7%, with the remainder of the top-up shopping trips being spread across the small and medium sized stores within the study area. Specifically within Aldershot 22.8% of shopping trip were in local shops. Tesco's in Aldershot accounted for 12.7% of top-up shopping trips.

Non-Food Shopping

5.7. Camberley was identified as the main non-food shopping destination with 22.1% of non-food shopping trips followed by Farnborough at 15.2% and Aldershot 16.2%. Aldershot, along with Camberley, Fleet and Farnborough, were identified as the top non-food destination in each of their own respective zones. Aldershot was also the top destination for non-food shopping trips from the Ash/Deepcut/Brookwood and Farnham zones.

5.8. In comparing the 2005 household survey results 19.57% of respondents completed their non-food shopping trips at Aldershot whilst 24.86% went to Camberley, 12.3% Farnborough and 10.57% at Guildford. This demonstrates a decline in the number of respondents completing their non-food shopping in Aldershot compared to an increase of respondents shopping in Farnborough. Whilst Aldershot is the third most popular destination for non food shopping, it has fallen in position compared to other centres i.e. Farnborough where the retail offer has improved.

Convenience Retail Projections

5.9. The analysis of convenience retail projections in 2010 indicated that the Tesco store in Aldershot is trading at more than double its benchmark turnover. The convenience retail projections also consider the Aldershot Urban Extension for small scale local retail provision. DPP have assumed a modest convenience store of 1,200 sq m (assumed to be net) to be trading in 2014 at an average sales density of £4,500 per sq m which would reduce capacity by £5.4m going forward. Other commitments in Aldershot also include a new Morrisons, which is currently under construction and it is not known when trading will commence, and Lidl foodstore (now trading).

5.10. The quantitative capacity analysis indicates that aside from the commitments identified there is no capacity for additional floorspace until 2016 when there is a modest amount of expenditure, which increases in 2019, and could support additional convenience floorspace within the Borough as shown in Table 1 below.

Table 1 – Convenience Capacity (Table xix DPP Retail and Leisure Study 2010)

Convenience Retail Floorspace Capacity	2010	2011	2016	2019
Surplus (£m)	-£3.22	-£1.16	+£6.49m	+£14.14m
Supermarket Capacity (sq m)			534	1,163
Small Stores Capacity (sq m)			1,298	2,828

Comparison Retail Projections

5.11. In considering capacity for comparison floorspace, DPP consider that the substantial vacant floorspace in Aldershot should be fulfilled before any significant comparison floorspace is provided. As such, there is no available capacity for comparison floorspace until 2019 as shown in Table 2 below.

Table 2 – Comparison Capacity (Table xxvii DPP Retail and Leisure Study 2010)

Comparison Retail Floorspace Capacity	2010	2011	2016	2019	2025	2027
Market Share of Growth	£0.0	£3.0	£28.4	£53.5	£115.7	£140.6
Vacant Space Notional Turnover	£47.0	£47.0	£47.0	£47.0	£47.0	£47.0
Net Comparison Capacity (£m)	-£47.0	-£44.0	-£18.6	£6.5	£68.7	£93.6
Surplus/Shortfall Retail Space (sq m)	-10,129	-9,478	-4,012	1,393	14,797	20,177

6. Health Check Assessment

6.1. DPP undertook health checks of Aldershot and North Camp as part of their 2010 Retail and Leisure Study. We have updated this information in July 2012. We have broadly used the same indicators as DPP for our health check updates. These indicators are as follows:

- Diversity of Main Town Centre Uses
- Retail Outlet Representation and Intentions to Change Representation
- Shopping Rents
- Proportion of Vacant Street-level Property
- Commercial Yields on Non-Domestic Property
- Pedestrian Flows
- Accessibility
- Perception of Safety and Occurrence of Crime
- State of the Town Centre Environmental Quality

Aldershot

Diversity of Main Town Centre Uses

6.2. The town centre's primary role is one of meeting convenience and comparison shopping needs of residents located in Aldershot and the surrounding area. The diversity of town centre uses reflects the role and function of the town centre within the retail hierarchy. To provide further information on the composition of the town centre, we have undertaken a land use assessment of Aldershot town centre, the results of which are provided in Table 3 below.

Table 3: Diversity of Uses - Aldershot

Use Class	Number of Units	%
A1 Convenience	18	5.2
Al Comparison	84	24.4
A1 Other	27	7.8
A2 Financial/Professional	42	12.2
A3, A4, A5 Food & Drink	43	12.5
B1 Business	*25*	*7.2*

B2 Industrial	*1*	*0.3*
B8 Storage/Distribution	*0*	*0.0*
C1 Hotel	*0*	*0.0*
C2 Residential Institution	*0*	*0.0*
C3 Residential	*23*	*6.7*
D1 Non Residential Institution	*4*	*1.2*
D2 Assembly & Leisure	*3*	*0.9*
Sui Generis	*10*	*2.9*
Vacant	65	18.8
Total	**345**	**100**

6.3. This illustrates that retail uses currently underpin the role of Aldershot town centre (62.1% of the total number of units in the town centre), dominating the different forms of land use. Convenience and comparison retailing accounts for approximately 29.6% of the total number of units in the town centre, whilst other “A” uses (including A1 (other), A2, A3, A4, and A5) account for 32.5% of the total number of units in the town centre.

6.4. Comparison retailing is the main use within the centre. These units range from multiple retailers including Marks and Spencer, Boots and Wilkinson’s to more independent retailers providing goods such as flowers, household furniture and accessories and clothing and shoes. Other uses such as travel agents and hairdressers are also well represented in the town centre.

6.5. The main convenience retailers in the town centre are Co-op, Lidl, and Iceland. Other convenience units include a local baker. A market is also held between 9:00am and 4:00pm at the High Street every Thursday, which serves as an additional attraction.

6.6. There are a number of A2 uses throughout the town centre, consisting of approximately 12.2% of the total number of units within the town centre. Most of the A2 uses consist of the high street banks and building societies together with a range of estate agents and insurance brokers.

6.7. There are a number of restaurants, cafes and bars in the town centre (A3, A4, and A5 uses), which account for approximately 12.5% of the total number of units in the town centre. There are also a number of leisure facilities.

6.8. In conclusion, Aldershot offers a diverse range of retail and service uses within the town centre, which meets the main shopping needs of its population and suggests it is a well represented, and reasonably healthy and viable town centre.

Retailer Representation and Intentions to Change Representation

6.9. There are a good variety of multiple retailers with premises in Aldershot including operators such as Marks and Spencer, Boots, and Wilkinson’s. These are located in the main retail core of the town centre on streets such as Union Street and in the Wellington Centre.

6.10. In addition to the comparison sector, the principal food shopping outlets in the centre are provided by Co-op, Lidl, and Iceland.

6.11. FOCUS suggests that 11 retailers were looking to locate in Aldershot in January 2010, which, given the economic conditions, compares favourably to 32 in 2005.

Shopping Rents

6.12. From an analysis of recent transactions, it would appear that typical rents in 2009 were £4.18 per sq m. This compares to £3.72 per sq m in 2001. A table detailing the trend of Zone A shopping rents from Colliers CRE is detailed in Table 4a below. A more up to date figure for 2012 has been obtained from PROMIS, which is outlined in Table 4b below.

Table 4a: Zone A shopping rents in Aldershot 1999 - 2009

	2001 (£/sq m)	2002 (£/sq m)	2003 (£/sq m)	2004 (£/sq m)	2005 (£/sq m)	2006 (£/sq m)	2007 (£/sq m)	2008 (£/sq m)	2009 (£/sq m)
Aldershot	3.72	4.18	4.18	5..11	5.11	5.57	5.57	5.11	4.18

Source: Focus

Table 4b: Zone A shopping rents in Aldershot at mid 2012

	2012 (£/sq m)
Aldershot	3.72

Source: PROMIS

Bearing in mind the current and past economic climate, the trend in rental figures demonstrates Aldershot's strength over the period from 2001 to 2007. Although rents have reduced from 2009 to 2012, this is not surprising in the current economic climate and although they have fallen back to the 2001 level, rental performances remain relatively strong.

Proportion of Street Level Vacant Properties

6.13. From completing a town centre health check in July 2012, we identified that the number of vacant units represented 18.8% of the total units in the town centre. Whilst vacancy rates is an indicator included within the criteria for measuring viability and vitality, caution should be exercised in placing too great a reliance upon it as vacant units can occur even in the strongest centres.

6.14. The vacancy rate in the town centre is currently above the national average of 14.5% (Local Data Company 2012). The vacant units are generally found throughout the centre, although there are noticeable concentrations within the Galleries, where almost all of the units are vacant, and within the Arcade. Our understanding of the position in respect of the Galleries is that the owners have terminated tenant agreements or have allowed these to expire in order to pursue redevelopment opportunities. We understand that L&C Investments Limited submitted a planning application (1200148/FUL) in February 2012 for the following:

> *'demolition of the existing three storey building and part of the Wellington Centre and the erection of a new three storey building comprising two retail units at ground floor with frontage onto Wellington Street, extension to existing retail unit in the Wellington Centre to form three retail units at first floor and two stockroom units at second floor with associated alterations to Wellington Centre.'*

6.15. However, this planning application was not validated until 18 October 2012. Although this planning application has not yet been determined, this development proposal outlines developer interest and investment in the town centre, which demonstrates confidence in the retail market in the town centre.

6.16. The situation at the Galleries is at least in part deliberate and has a significant influence on the vacancy level in Aldershot. With the Galleries excluded from the calculations, the vacancy level falls to 13.9%, which is below the national average.

Commercial Yields on Non-Domestic Property

6.17. Caution should be given to relying heavily on commercial yields as an indicator, but it is a useful guide to demonstrate the level of confidence of investors in the long-term viability of the centre. It is apparent from the Property Market Report July 2008 produced by the Valuation Office Agency that the Shopping Centre yield for Aldershot was 7% in July 2008 as shown in Table 5 below. This has slightly improved since 2004 when the shopping centre yield was 8%, as shown in the table below detailing figures supplied by the Valuation Office Agency. This demonstrates that confidence by retailers and investors in Aldershot town centre may have improved over this period.

Table 5: Yields in Aldershot town centre 2000 - 2008

	10/00	04/01	10/01	4/02	10/02	4/03	1/04	7/04	1/05	7/05	1/06	7/06	1/07	7/07	1/08	7/08
Aldershot	8	8	8	8	8	8	8	8	7	7	7	7	7	7	7	7

Source: Property Market Report July 2008, Valuation Office Agency

Pedestrian Flows

6.18. Aldershot town centre is rather 'contained' in its form and structure. Whilst pedestrian flow information has not been undertaken as part of this study, our observations of the centre confirm that the greatest pedestrian flows exist within the pedestrianised areas of Union Street, Wellington Street, and the Wellington Shopping Centre which is consistent with the Local Plan's definition of the 'Shopping Core'. Victoria Street was also well used by pedestrians.

6.19. It is evident that several factors influence pedestrian movements. The location of the car parking and the diversity of uses is a key factor in the relative strength of pedestrian movements.

Accessibility

6.20. The following section reviews the relative accessibility of Aldershot town centre, and examines the ease and convenience of access by a choice of means of transport.

Public Transport Provision

6.21. Aldershot offers a good level of accessibility with a range of public transport. Frequent bus services provide connections to the surrounding residential areas and other settlements. There are bus stops located throughout the town centre. Bus services, including routes 1, 3, 4/5, 15, 17/18/19, 20, 46, and 70, link Aldershot with the surrounding settlements.

6.22. South West Trains serve Aldershot's main line station which provides good links to towns such as Alton, Guildford and Ascot, as well as providing a direct rail link to central London (Waterloo). The train station is located on Station Road to the south west of the town centre, which is within walking distance of the retail core of the town centre.

6.23. Aldershot also has a community service known as 'Dial-a-Ride' which is a door to door service for people who find it difficult to use existing public transport. The service requires membership to which there is an annual fee. Dial-a-Ride users can be collected from them homes and taken to their pre-arranged destinations within the Rushmoor area.

Vehicular Access and Parking

6.24. Accessibility to the town centre by car is relatively good. Aldershot is located along the A323 and A325 within easy reach of the A31 and A331.

6.25. There are a number of car parks located around the town centre for both long and short stay parking, notably the multi storey car parks include High Street (approx. 400 spaces) and the Wellington Centre (approx. 400 spaces). Surface level car parks include Frederick Street (approx. 80 spaces), High Street (approx. 90 spaces), Wellington Avenue (approx. 30 spaces), and Birchett Road (approx. 70 spaces). In addition, there are a few smaller car parks and a number of on street car parking spaces along streets within the town centre.

6.26. Overall the town centre is easily accessible by car and there is sufficient car parking provision relative to the size of the town centre.

Perception of Safety and Occurrence of Crime

6.27. The main shopping area within the town centre is pedestrianised and has a diverse offer, there is activity throughout the day and into the evening. CCTV cameras have been installed around the town centre, which are monitored 24 hours a day. These features increase the perception of safety and security within the town centre.

6.28. However, a lack of residential properties in the town centre leave parts of the town relatively deserted in the evenings. UK Crime Statistics suggest the crime in Aldershot has generally declined since 2009.

6.29. A community safety partnership operates in Rushmoor, consisting of a number of statutory agencies and other partners with the aim of providing a unified approach to crime, disorder and anti-social behaviour to build safer and stronger communities throughout the Rushmoor area.

Town Centre Environmental Quality

6.30. The western end of the town centre is located within the Aldershot West Conservation Area, and we understand that the Council propose to significantly expand the conservation area to include much of the town centre. Within this wider area, there are 12 listed buildings, all of which are of regional and local significance. Aldershot has maintained a Victorian layout and a number of buildings from this era survive in the town centre. This provides a link to the town's history and evolution, which is linked to the presence of the military since approximately 1850.

6.31. The lack of planting and landscaping through the centre was noted during our visit, although Union Street does benefit from some limited planting and street furniture. This lack of planting and street furniture as well as pavements in poor condition in some places does create a perception of poor environmental quality particularly in secondary area of the town centre. Some improvements to pavements along Victoria Road were under construction at the time of the survey.

6.32. Due to the town centre's layout and the pedestrianisation of many of the streets, High Street and Victoria Road provide the only streets with active shopping frontages. With the exception of the Queens Hotel and the open space at the western end, High Street is characterised by predominantly non-retail uses including bars, takeaways, amusement arcades, and the entrance to the largely vacant Galleries. Similarly Victoria Street is mainly fronted by similar uses and buildings. The majority of Aldershot's retail units are located in shopping centres.

6.33. Both Wellington Street and Union Street are pedestrianised providing a more pleasant shopping environment. The Wellington Centre is covered and well maintained and also provides a higher quality environment.

6.34. Rushmoor Borough Council adopted the Aldershot Town Centre SPD in 2009. The SPD outlines a strategy for improvement over the next 10-15 years, which is in the process of being implemented.

North Camp

6.35. Local planning policy identifies North Camp as a district centre.

Diversity of Uses

6.36. The diversity of town centre uses present at North Camp reflects the role and function of the district centre. We have undertaken a land use assessment of North Camp district centre in July 2012 to provide further information on the composition of the centre and the results are shown in Table 6 below.

Table 6: Diversity of Uses – North Camp

Use Class	Number of Units	%
A1 Convenience	15	7.0
Al Comparison	49	22.9
A1 Other	14	6.5
A2 Financial/Professional	10	4.8
A3, A4, A5 Food & Drink	27	12.6
B1 Business	*17*	*7.9*
B2 Industrial	*9*	*4.2*
B8 Storage/Distribution	*1*	*0.5*
C1 Hotel	*1*	*0.5*
C2 Residential Institution	*0*	*0.0*
C3 Residential	*35*	*16.4*
D1 Non Residential Institution	*12*	*5.6*
D2 Assembly & Leisure	*1*	*0.5*
Sui Generis	*10*	*4.8*
Vacant	13	6.1
Total	**214**	**100**

6.37. This illustrates that retail uses currently account for 36.4% of the total number of units in the town centre, dominating the various forms of land use.

6.38. Comparison retailing offer is relatively low (22.9% of the total number of units in the town centre), which is indicative of its district centre status. Many of the retailers are independent traders with only Boots being a multiple retailer. Many of the independent traders cater for specialist markets such as motorcycles.

6.39. Convenience retailing accounts for 7.0% of the total number of units in the town centre. The main convenience retailer in the centre is Co-op. Other convenience units include local traders, which suggest that trips are generally for top-up rather than main food shopping.

6.40. In contrast, the provision of other “A” uses (including A1 (other) A2, A3, A4, and A5) is high accounting for 23.9% of the total number of units in the district centre. There are a number of A2 uses throughout the town centre, most of which consist of the banks and estate agents, and financial services. There are also a number of restaurants, cafes and bars, and a number of leisure facilities.

6.41. In conclusion, North Camp offers a range of retail and service uses within the district centre, which meet the convenience and day to day needs of its local population and a wider population in certain specialist markets.

Retailer Representation and Intentions to Change Representation

6.42. As discussed above, there is only one multiple retailer within North Camp, namely, Boots. Other comparison retailers are formed of independent traders. In addition to the comparison sector, the principal food shopping outlet in the centre is provided by Co-op, with a number of local traders.

6.43. It is still evident that various regeneration initiatives promoted by the Council through the North Camp Regeneration Strategy 2005-2007 have seeked to address past levels of decline and provided environmental improvements.

6.44. No information is available on retailer requirements in North Camp district centre.

Shopping Rents

6.45. No independent information is available on shopping rents within North Camp district centre.

Proportion of Street Level Vacant Properties

6.46. The health check demonstrates that the number of vacant units are represented 6.1% of the total units in the town centre. This vacancy rate in the town centre is currently significantly below the national average of 14.5% (Local Data Company 2012). The vacant units are spread throughout the centre.

Commercial Yields on Non-Domestic Property

6.47. No independent information is available on yields for North Camp district centre.

Pedestrian Flows

6.48. North Camp district centre is relatively ‘contained’ in its form and structure. Whilst pedestrian flow information has not been undertaken as part of this study, our observations of the centre reveal that pedestrian flows are relatively low, but are focused on Camp Road.

Accessibility

6.49. The following section reviews the accessibility of North Camp district centre, and examines the ease and convenience of access by a choice of means of travel.

Public Transport Provision

6.50. North Camp offers a good level of accessibility with frequent bus services providing connections to the surrounding residential areas and other settlements such as Farnborough, Ash, and Frimley. There are bus stops located throughout the town centre served by routes including 1, 41, 56, and 401, which link North Camp with the surrounding settlements.

6.51. North Camp Railway Station is located off Lynchford Road, which is approximately ten minutes walk to the east of the district centre. This provides direct train links to Guildford and Farnborough North Railway Stations.

Vehicular Access and Parking

6.52. Car accessibility to the town centre is good, as North Camp is located in close proximity to the A331 and the M3.

6.53. There are two car parks within North Camp, at Peabody Road and off Lynchford Road totalling approximately 120 spaces. Additionally, on street parking is available in the centre on a pay and display basis for a maximum of an hour.

Perception of Safety and Occurrence of Crime

6.54. UK Crime Statistics suggest the crime in North Camp declined between 2009 and 2010, and has remained at the same level since 2010. All of the streets within the district centre are characterised by active uses, on street parking and adequate street lighting, which improves the perception of safety.

6.55. A community safety partnership operates in Rushmoor, consisting of a number of statutory agencies and other partners with the aim of providing a unified approach to crime, disorder and anti-social behaviour to build safer and stronger communities throughout the Rushmoor area.

State of the Town Centre Environmental Quality

6.56. The regeneration initiatives that have taken place within North Camp over the past few years have improved the environmental quality of the streets and buildings to a reasonably high level. There are large amounts of planting to the south of Lynchford Road that creates a pleasant atmosphere for shoppers. However, some areas remain of poor quality and in need of improvement, and the high level of on street parking creates a degree of congestion in the centre.

7. Retail Impact Assessment Methodology

7.1. A review of the Council's Retail Study produced by DPP has been undertaken to establish the background for retail requirements in Aldershot, the results of which are set out in section 5.

7.2. This assessment has been scoped with Rushmoor Borough Council and their retail consultant NLP. It has been agreed that a portion of the study area and a similar methodology to the November 2010 DPP study should be adopted for this assessment. The methodology we have used in this assessment is, therefore, as follows:

I. Establish the population of the Study Area and each of the Zones;

II. Establish the expenditure per capita of population of each Zone within the Study Area for both convenience and comparison goods;

III. By a combination of steps (i) and (ii) establish the available expenditure of the Study Area for both convenience and comparison goods;

IV. Identify the market share of each centre/store within the Study Area (and significant facilities outside the Study Area) from the household telephone survey;

V. Assess the flow of expenditure to each location by applying market shares from step (iv) to available expenditure from step (iii);

VI. Identify the existing floorspace and approved schemes (commitments) within and immediately outside the Study Area together with their turnovers;

VII. Calculate the turnover of the proposed development based on average sales densities for convenience and comparison goods; and

VIII. Assess the trade draw of the proposed development from existing stores and centres to determine the impact the proposed development will have on the existing stores and centres, particularly Aldershot town centre and North Camp district centre. This is done for both convenience and comparison goods.

Price Basis and Forecasting Dates

7.3. We have based this assessment on the DPP RLS, but have updated the population and expenditure data, convenience and comparison growth rates from Pitney Bowes Business Insight (formally MapInfo), and sales density figures. All monetary figures are expressed in 2008 prices as per the DPP RLS. We have identified a base year of 2012 and a design year for the Local Neighbourhood Centre within the Aldershot

Urban Extension of 2017. This design year has been adopted in line with the requirements of the NPPF Paragraph 26, which states that:

7.4. *"the impact of the proposal on town centre vitality and viability, including local customer choice and trade in the town centre and wider area, up to five years from the time the application is made..."* The design year of 2017 is a worst case scenario as the Local Neighbourhood Centre is likely to be implemented after 2017 due to the critical mass for the implementation of the Local Neighbourhood being the occupation of1,000 dwellings. Works to the 4th District Headquarters will not be completed until the occupation of 1,500 dwellings. Any impact caused by the development is likely to be lower due to increased population and expenditure levels at a later date. This approach has been agreed with the Council and NLP.

Catchment Area and Household Interview Survey

7.5. DPP commissioned a Household Interview Survey in May 2010 to inform their retail capacity forecasts in their 2010 RLS. It has been agreed with the Council/NLP that this survey is still robust so we have used the results within this RIA. The catchment area is therefore also based on the DPP RLS, and the catchment area for this RIA has been formed from zones 1, 2, 3, 4, and 5 of the DPP RLS. This has been agreed with the Council/NLP.

Population and Expenditure

7.6. As agreed with the Council/NLP, we have used up to date population and expenditure per capita data from Pitney Bowes Business Insight for the respective zones. Up to data growth rates have also been applied to both the population and expenditure baseline data.

7.7. The population data has been projected to the design year of 2017 using growth rates from the Hampshire County Council forecasts (on a Ward basis where appropriate), the results of which are set out in Table 1 of **Appendix C**.

7.8. The expenditure per capita data has also been projected to 2017 using the growth rates from the Pitney Bowes Business Insight Expenditure Guide 2012/2013, as set out in Table 7 below. We have also taken account of Special Forms of Trading at the rate set out in the Pitney Bowes Business Insight Expenditure Guide 2012/2013. The results are outlined in Table 2 of **Appendix C** and show the expenditure per capita estimates for convenience and comparison goods from 2012 to 2017.

Table 7 - Growth Rates

	2011	2012	2013	2014	2015	2016	2017
Convenience	-3.2%	-1.1%	-0.8%	0.8%	1.1%	1.2%	1.2%
Comparison	0.5%	0.4%	2.5%	4.7%	5.1%	5.5%	5.4%

Source: Pitney Bowes Business Insight – Expenditure Guide 2012/2013

7.9. By applying the expenditure per capita figures to the estimated levels of population, Tables 3a and 3b of **Appendix C** illustrate the total available convenience and comparison expenditure for the catchment area between 2012 and 2017.

Existing Shopping Patterns

7.10. As detailed above, we have used the results of the May 2010 household survey commissioned by DPP for the catchment area (zones 1, 2, 3, 4, and 5). The results of this survey have been applied to the total available expenditure for each zone for both convenience and comparison goods to give the turnover of each store or centre at 2012, and the results are set out in Table 6 of **Appendix C**. These turnover figures have then been projected forward to the design year of 2017 using the same household survey results and the total available expenditure for 2017, and are shown in Table 7 of **Appendix C**.

7.11. The floorspace of existing retail premises have been taken from the DPP RLS and updated where relevant using GOAD and site surveys.

7.12. Commitments since the DPP RLS provided by and agreed with the Council/NLP have also been taken into account in the RIA, and are shown in **Appendix C**.

Convenience Benchmark Turnovers

7.13. The convenience benchmark turnovers for the main foodstores are based on those provided by DPP in their RLS, and, where relevant, updated using GOAD and site surveys, and Retail Rankings and Verdict.

7.14. The benchmark turnovers are calculated based on the convenience sales floorspace and the average sales density for the particular operator. The results are set out in Table 4 **Appendix C** and have been agreed with the Council/NLP.

Turnover of the Proposal

7.15. Details of the estimated turnover of the proposed development can be found in Table 11 of **Appendix C**. This turnover is calculated using the net floorspace figures of the development for both convenience and comparison floorspace.

7.16. The turnover of a modest convenience store of 1,200 sq m at Aldershot Urban Extension was assessed by DPP where they applied an average sales density of £4,500 per sq m. NLP do not consider this figure to still be appropriate and robust for the convenience store proposed, and have therefore suggested that we apply an average sales density of £10,000 as a worst case scenario. Based on a gross:net floorspace ratio of 70:30 as agreed with NLP, the proposed net convenience floorspace of 1,110 sq m results in a convenience turnover of £11.10m.

7.17. In terms of comparison goods, DPP adopted a 'generic' town centre comparison floorspace sales density of £4,640 per sq m when calculating comparison floorspace capacity. We consider this figure to still be an appropriate and robust figure, which has been agreed with the Council/NLP, and have therefore based our assessment on this figure. Based on a gross:net floorspace ratio of 70:30 as agreed with NLP, the proposed net comparison floorspace of 1,092 sq m results in a comparison turnover of £5.07m.

7.18. These are typical sales densities due to the occupiers being unknown at this stage. As discussed previously, the proposed floorspace represents a maximum floorspace for the proposed development and therefore is a worst case scenario at this outline application stage, and consequently the anticipated turnover of the proposed foodstore is also a worst case scenario in terms of assessing its impact.

7.19. Furthermore, we would normally expect approximately 10% of the proposed turnover to come from outside the catchment area, however, for the purposes of this assessment, we have assumed that 100% of the proposed turnover will come from within the catchment area.

8. Retail Impact Assessment

8.1. This section considers the application proposal against the policies contained within the NPPF. In particular, the potential impacts of the scheme are considered as follows and this section is structured accordingly.

- Impact is considered in accordance with Paragraph 26 of the NPPF.
- The wider impacts and overall conclusions.

8.2. The current main food shopping patterns, as highlighted in the Household Survey, show that the majority of convenience shopping within the study area is undertaken at Tesco in Aldershot, Asda in Farnborough, Sainsbury's in Farnham, Sainsbury's in Camberley, Waitrose in Camberley, Morrisons in Fleet, Waitrose in Fleet, Waitrose in Yateley, and Tesco in Sandhurst.

8.3. Further analysis of the results provides a detailed breakdown for each zone. This shows that the majority of main food convenience shopping is undertaken in the following stores in each respective zone:

- Zone 1 – Asda in Farnborough (29.7%), Morrisons in Farnborough (22.0%), Sainsbury's in Camberley (12.1%), and Tesco in Sandhurst (8.8%).
- Zone 2 – Asda in Farnborough (8.0%), Tesco in Aldershot (57.6%), and Sainsbury's in Farnham (23.2%).
- Zone 3 – Asda in Farnborough (9.4%), Tesco in Aldershot (47.7%), Sainsbury's in Camberley (17.7%), and Sainsbury's in Farnham (9.4%).
- Zone 4 – Tesco in Aldershot (51.0%) and Sainsbury's in Farnham (28.6%).
- Zone 5 – Tesco in Aldershot (11.7%), Morrisons in Fleet (24.5%), Sainsbury's in Fleet (12.8%), and Waitrose in Fleet (31.9%).

8.4. The above demonstrates that the majority of shopping is undertaken within the zone in which the respondent lives confirming the importance of the distance from home in the choice of food shopping destinations, indeed 76.5%% of all respondents in the household survey had 'home' as the location they were at immediately before going to undertake their food shopping and 89.6% had 'home' as the location they were at immediately after undertaking their food shopping.

8.5. In relation to comparison goods shopping the Household Survey found the majority of residents surveyed purchased comparison goods in Aldershot, Farnborough and Fleet within the Study Area, and Camberley and Guildford which are outside the Study Area.

8.6. In terms of a more detailed breakdown, the majority of comparison shopping is undertaken in the following centres in each respective zone:

- Zone 1 – Basingstoke, Guildford, Farnborough, and Camberley.
- Zone 2 – Aldershot, Camberley, Farnham, and Guildford.
- Zone 3 – Aldershot, Camberley, Guildford and Farnborough.
- Zone 4 – Aldershot, Camberley, and Guildford.
- Zone 5 – Fleet, Camberley, and Basingstoke.

8.7. The above demonstrates that people are prepared to travel further to undertake comparison shopping. It also shows that there is an amount of this type of shopping occurring outside of the study area with some expenditure leakage taking place.

8.8. With reference to the retail information available and taking into account the identified shopping patterns the specific impact considerations within Paragraph 26 of the NPPF are considered below.

The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal

8.9. The main proposals for Aldershot are those set out within the adopted Core Strategy. The main allocation in the Core Strategy is the Aldershot Urban Extension which is proposed in this planning application. The Local Neighbourhood Centre supported by this assessment forms part of the urban extension.

8.10. Other than the proposals identified in the development plan documents and submitted as part of this planning application, Morrisons were granted planning permission for a new store in Aldershot in December 2010, and commenced trading on the 29th October 2012. This commitment has however been factored into our analysis of cumulative impact.

8.11. As outlined in Section 6 above, a planning application (12/00148/FUL) has been submitted and validated on 18 October 2012 for the redevelopment of part of the Wellington Centre to create 5 retail units. We consider that the proposed Local Neighbourhood Centre at Wellesley will not impact on the development proposed at the Wellington Centre as the proposals will serve very different functions. As discussed previously, the Local Neighbourhood Centre will fulfil the day to day shopping needs of the new local population at Wellesley, and the proposed redevelopment of part of the Wellington Centre will serve to support the role of Aldershot town centre.

8.12. We are not aware of any other significant existing, committed, or planned schemes in Aldershot in addition to those described above and considered in this assessment.

The impact of the proposal on town centre vitality and viability including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For schemes where the full impacts will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made

Impact on Town Centre Vitality and Viability and Local Consumer Choice

8.13. As detailed above, we have undertaken an update to the Aldershot and North Camp health checks contained within the DPP retail study with reference to the criteria outlined in the practice guidance on need, impact and the sequential approach.

8.14. The analysis shows that there is strong comparison and convenience retailer representation in the centres of Aldershot and North Camp. There is a good diversity of uses and the core retail area is highly accessible. The assessment concludes that these centres are performing their role within the retail hierarchy reasonably well. We also consider that the centres are 'holding their own' compared to nearby competing centres.

8.15. The convenience floorspace proposed within the Local Neighbourhood Centre will provide for the day to day needs of the new local population. It will not be of a scale or have a turnover or attraction that is likely to have a significant adverse impact on the existing convenience goods provision.

8.16. The types of comparison goods that will be sold from the proposed development are likely to be convenient in their nature with a relatively small turnover. Therefore, it is unlikely to undermine the future of any of the town centres within the catchment area. Indeed, we consider that the comparison element of the proposed development is critical to enable the Local Neighbourhood Centre to function well and provide for the day to day needs of the new local population.

8.17. Furthermore, other uses are proposed as part of the Local Neighbourhood Centre over and above the convenience and comparison retail uses. Although we have assessed that all of the retail floorspace (excluding the foodstore) will be occupied by comparison goods retailers as a worst case scenario, it is likely that some of the floorspace will be occupied by financial and professional services, restaurants and cafes, drinking establishments, and hot foot takeaways. The Local Neighbourhood Centre will also be supported by office space and a nursery/day care centre.

8.18. The balance of convenience and comparison floorspace, and other retail uses proposed has significant sustainability benefits that will enable the new local population to walk or cycle for their day to day shopping needs.

8.19. The conclusion of this analysis is that the potential impact of the proposed development is not likely to affect Aldershot and North Camp centre's vitality and viability, or their current performance. The impact on other local and district centres is unlikely to affect their vitality and viability as these fulfil a local shopping role in their respective neighbourhoods.

Impact on Trade in the Town Centre and Wider Area

8.20. For the purpose of this assessment we have examined a design year of 2017 (five years from when the application is made). We consider below any potential impacts, particularly on Aldershot town centre and North Camp district centre, of the proposed development in terms of convenience and comparison goods shopping.

Convenience Goods

8.21. We anticipate that the proposed foodstore will divert the majority of the convenience expenditure from stores in Aldershot, Farnborough, and Fleet. The size and location of the proposed store is such that it is likely to compete with medium to large sized stores rather than divert significant amounts of trade from smaller stores. In addition, the store will provide a retail offer for the new local population and provide for the day to day shopping needs of this population. It is not envisaged that the floorspace will be of a scale that will attract significant levels of spending from other stores.

8.22. Tables 12 and 13 of **Appendix C** details two impact scenarios. Table 12 illustrates the potential impact of the proposed foodstore on the convenience turnover of existing foodstores, based on our trade draw estimates and a comparison against their respective company averages based on the information detailed in Table 4 of **Appendix C**. Table 13 of **Appendix C** illustrates the potential impacts factoring in known commitments and trade draw estimates for the proposed development (as agreed with the Council and NLP), on the assumption that the growth in expenditure will go to existing stores on a pro rata basis. This is then modelled as part of the overall impact assessment.

8.23. In the trade draw estimates of the proposed foodstore in solus, we estimate that 22% of the turnover of the proposed store will be derived from the Tesco store in Aldershot, 15% from the Asda in Farnborough, 8% from the Morrisons in Farnborough, 5% from the Sainsbury's in Farnborough, and 5% from the Budgens in Aldershot. The remaining of the trade to the proposed foodstore will be drawn from smaller local stores within Aldershot. This trade draw is calculated based on the shopping patterns identified in the household survey results, the size and offer of the respective stores taking into account the well established principle that 'like affects like', and their distance from the application site.

8.24. As previously stated, the proposed foodstore will be located within Wellesley. There are also other uses proposed within the local neighbourhood including comparison goods retailers, offices, a public house/restaurant, and a nursery/day care centre. This location and the adjoining uses will make the foodstore attractive to people from Wellesley, and customers and employees of the other uses within the Local Neighbourhood Centre.

8.25. Table 12 shows the turnovers of the existing stores at 2017 based on the available expenditure in the study area and the results of the household survey. The trade draw from the existing stores to the proposed foodstore has been calculated (as outlined above) to give the resultant turnover with the proposed foodstore. The resultant turnover figures have then been compared to the average benchmark turnover level for each of the relevant operators which is outlined in Table 4. This illustrates that with the proposed foodstore, Tesco in Aldershot will be trading at 256% of its company average turnover level, Iceland in Aldershot will be trading at 167% of its average turnover level, Marks and Spencer in Aldershot will be trading at 107% of its average turnover level, Co-op in Aldershot will be trading at 93% of its average turnover level. These turnover levels, being mostly above company average levels are considered to be acceptable and we consider that there is not a significant adverse impact as a result of the proposed store.

8.26. When factoring in the known commitments, which we have taken into account prior to the implementation of the proposed development as suggested by NLP, Table 13 illustrates that the expected negative impacts on Asda in Farnborough will be -6.2%, -4.1% on the Sainsbury's in Farnborough, -0.3% on the Morrisons in Farnborough, and -32.5% on the Tesco in Aldershot. The majority of these impacts are as a result of the Morrisons development in Aldershot, and the trade diversions predicted by NLP for the Morrisons store have formed the basis for this assessment.

8.27. After factoring in the proposed development, Table 13 illustrates that the cumulative impacts on Asda in Farnborough will be -8.9%, -8.5% on the Sainsbury's in Farnborough, -3.6% on the Morrisons in Farnborough, -9.1% on the Co-op in Aldershot, and -34.1% on the Tesco in Aldershot. Despite the relatively large negative impact on the Tesco store in Aldershot, this store is currently trading significantly above its company average turnover level (as discussed above), and after factoring in known commitments and the proposed development, this store will still be trading at 161% of its company average turnover levels. Many of the other main stores, including Asda and Morrisons in Farnborough and Marks and Spencer and Iceland in Aldershot will also still be trading at or above their company average turnover levels. Therefore, we consider that these stores are more than capable of withstanding the estimated impacts.

8.28. Other stores including Sainsbury's and Iceland in Farnborough and Co-op in North Camp will appear to be trading significantly below their company average turnover levels, at 48%, 30% and 10% respectively, after factoring in the known commitments and the proposed development. However, these stores did not feature highly in the household survey and even before factoring the known commitments and the proposed development they were trading significantly below their company average turnover levels. Therefore, considering that the impact of the known commitments and the proposed development on these stores is not considered to be significantly adverse, these stores are capable of withstanding the estimated impacts.

8.29. There is, therefore, no significant adverse impact from the proposed store on the town centre of Aldershot and North Camp. Taking into account commitments there is some negative impact, but this is not considered to be significantly adverse nor will it result in the closure of any of the affected stores. This is particularly the case when considered in the context of the future growth in population and expenditure as a result of Aldershot Urban Extension.

8.30. Although we anticipate there will be a degree of impact on Aldershot and North Camp centres, as detailed above, we do not consider these impacts to be significant, and in any event, the surplus in comparison goods expenditure and the turnover that the centres (particularly North Camp) receive from Leisure goods will continue and more than compensate for any impacts caused as a result of the proposed development.

8.31. Furthermore, the potential impacts are a worst case scenario as the proposed floorspace is a maximum. Clearly a reduction in floorspace will decrease any impacts as a result of the proposed development.

8.32. Notwithstanding this, DPP assessed a convenience store of approximately 1,200 sq m within their retail study, which formed the evidence base for the adopted Core Strategy. Therefore, we consider that the proposed foodstore does not significantly exceed this, and should be considered favourably as it accords with the allocation of the Local Neighbourhood Centre in an adopted development plan.

Comparison Goods

8.33. We anticipate that the proposed comparison floorspace will divert some expenditure from Aldershot, Farnborough, and Fleet town centres as well as a small amount from other smaller centres such as North Camp district centre. The amount and nature of the proposed floorspace, and location within Wellesley means that it will provide a retail offer that serves the day to day needs of this new local population. It is not envisaged that the floorspace will be of a scale that will attract significant levels of spending from centres such as Aldershot and North Camp.

8.34. Tables 14 and 15 of **Appendix C** outline two impact scenarios. Table 14 sets out the potential impact of the proposed comparison floorspace on the comparison turnover of existing centres, based on our trade draw estimates. Table 15 of **Appendix C** illustrates the potential impacts based on known commitments and factoring the same trade draw estimates (agreed with the Council and NLP). This is then modelled as part of the overall impact assessment.

8.35. When assessing the trade draw estimates of the proposed comparison floorspace, we estimate that 40% of the comparison turnover will be diverted from Farnborough, 30% from Aldershot, 20% from Fleet, and 10% from other centres including North Camp. This trade draw is calculated based on the shopping patterns identified in the household survey results and the distance of the respective centre from the application site.

8.36. Table 15 shows that the growth in expenditure will more than compensate for the predicted trade diversions of the known commitments and the proposed development. Indeed there is an overall increase in the turnover of all the centres due to the growth in expenditure exceeding the predicted trade diversions.

8.37. There is, therefore, no significant adverse impact on the existing centres as a result of the proposed comparison floorspace and the known comparison commitments. This is particularly the case when considered in the context of the future growth in population and expenditure as a result of the Aldershot Urban Extension.

8.38. As previously stated, the proposed comparison development will be located within Wellesley. There are also other uses proposed within the Local Neighbourhood Centre including a convenience store, offices, a public house/restaurant, and a nursery/day care centre. This location and the adjoining uses will make the comparison floorspace attractive to people from the urban extension, and customers and employees of the other uses within the Local Neighbourhood Centre.

8.39. Furthermore, the trade diversion is a worst case scenario as the proposed floorspace is a maximum. Clearly a reduction in floorspace will decrease any impacts as a result of the proposed development.

Wider Impacts

8.40. It is also necessary to consider the wider impacts of the proposal. In this instance, the following issues should be considered:

- Resilience to Climate Change
- Accessibility
- Design
- Economic Regeneration
- Physical Regeneration
- Job Creation

8.41. Information about each of these issues is provided in the supporting information that accompanies the planning application. We comment briefly on each in turn below:

Resilience to Climate Change

8.42. Details of the measures proposed to minimise the proposal's impact on the environment are outlined in the accompanying Environmental Statement and Design and Access Statement. In particular the scheme will seek to minimise the overall carbon footprint of the retail element of the proposal and the management of resources (including energy efficiency and use of water).

8.43. The development as a whole will assist in delivering sustainable economic development through an urban extension that offers residential, employment, leisure, service, and retail uses in one place with the benefit of enabling linked trips, which will reduce the need to travel.

Accessibility

8.44. The accessibility of the site and the measures proposed as part of the development including encouraging the use of non-car modes are described in more detail in the Transport Assessment and Design and Access Statement that accompany the planning application.

8.45. The site layout has been designed in accordance with best practice to ensure safe and adequate cycle and pedestrian access for customers and employees. Careful consideration has also been given to ensure the Local Neighbourhood Centre links strongly with the other proposed elements on the site and the surrounding area.

Design

8.46. The Design and Access Statement describes how the development will achieve high quality, inclusive design. The proposed scheme is well related to the existing character of the locality in terms of scale, massing and height as well as providing a quality setting for the development with adequate servicing, waste handling, recycling and storage. Detailed design will be dealt with as part of the reserved matters stage.

8.47. The proposed Local Neighbourhood Centre will provide safe and convenient level access for customers and its employees, including the provision of parent and child and disabled spaces, together with cycle and motorcycle parking spaces.

8.48. A landscaping scheme will be proposed within and around the application site that ties in with the overall landscaping of the wider area.

Economic Regeneration

8.49. The Local Neighbourhood Centre will help stimulate economic development within the local area through the provision of direct employment opportunities, which will help to address current unemployment in the area; and will contribute to the Development Plan's objective to stimulate economic development within the town.

8.50. On a wider basis the Local Neighbourhood Centre represents a piece of sustainable economic development, which offers investment in an accessible retail facility for both the new community within Wellesley and the existing surrounding area, whilst providing for the day to day needs of the local population.

Physical Regeneration

8.51. The proposal will transform the existing site creating a sustainable urban extension that will be well connected to the surrounding area and Aldershot town centre specifically through a well considered site layout. The site is key to the regeneration of the area and the redevelopment will have benefits for Aldershot and the area as a whole. Further details are outlined in the Environmental Statement and, Design and Access Statement, and the submitted plans.

Job Creation

8.52. The proposal will create a range of full time and part time jobs. These will include the construction jobs during the build period. Following that there will be a number of permanent employment opportunities ranging from unskilled employment through to senior management/executive positions.

8.53. Based on typical employment densities, the Local Neighbourhood Centre will create approximately 460 FTE jobs. The retail element will create approximately 150 FTE jobs. The development on the remainder of the site is likely to create approximately 750 FTE jobs. The proposal will therefore generate a total of around 1,210 FTE jobs. In the current economic climate the jobs created and any subsequent positive multiplier effects caused will assist the local area in its future economic development and growth. We do recognise that some of the jobs within the Local Neighbourhood Centre will include the displacement of some jobs from existing retail premises. However, it is anticipated that this displacement will only be a smaller number and it will not have a negative effect on existing stores. The creation of new jobs and the benefits of employment possibilities from the proposed development are considered to significantly outweigh any displacement of existing jobs.

9. Sequential Approach

9.1. We have discussed the relevance of the sequential approach through our pre-application discussions with the Council and NLP, and given that the site is allocated for an urban extension including a Local Neighbourhood Centre and the convenience floorspace has been tested by DPP in their retail study that forms the evidence base for the adopted core strategy, it has been agreed that a sequential assessment is not required for this element of the proposal.

9.2. As has been discussed in earlier sections, we consider that the floorspace proposed and the uses proposed are critical for the Local Neighbourhood Centre to fulfil its role. The form and scale of the comparison floorspace, along with the convenience floorspace and any other retail uses proposed, will provide for the day to day shopping needs of the new local population in a sustainable manner.

9.3. The reduction of the floorspace and uses, and the relocation to Aldershot or North Camp centres would not allow the new Local Neighbourhood Centre to function as it is envisaged or proposed within planning policy. Therefore, it is considered that the proposed size and location for the Local Neighbourhood Centre is appropriate for it to be sustainable and achieve the objectives of the development. It will also provide a focal point in the vicinity of a Listed Building whilst respecting the character and setting of the building.

9.4. Therefore, due to the reasons identified above, it is considered there is no need for a sequential assessment, particularly considering that the site is allocated for an urban extension including a Local Neighbourhood Centre that includes small scale retail uses.

10. Summary and Conclusions

10.1. This retail assessment accompanies a 'Hybrid' planning application submitted by Grainger plc to Rushmoor Borough Council for the development of land within Aldershot known as the Aldershot Urban Extension. Outline planning permission is sought for residential development of up to 3,850 dwellings with associated infrastructure including access, and Maida Zone - Phase 1 detail for 235 dwellings at Wellesley (the Hybrid Application).

10.2. It is proposed that the Local Neighbourhood Centre will comprise the following:

- New Retail Unit (moderate sized foodstore) – 1,400 sq m gross
- Additional Retail Units in the Local Centre – 1,560 sq m gross
- Additional retail within site boundary: 185 sq m gross (REME site)
  Plus:
- Office space – 3,172 sq m
- Public House/Restaurant – 608 sq m
- Nursery/Day Care Centre – 330 sq m

10.3. The proposed development is located within Wellesley, and will provide retail facilities for the new local population and other users of the proposed development.

10.4. Aldershot and North Camp offer a diverse range of retail and service uses within the town centre, which go some way to meeting the needs of its population. They are well represented, reasonably healthy, vital and viable centres.

10.5. From our general observations it is clear that Aldershot and North Camp are centres that rely primarily on car borne visitors. The NEMS household survey commissioned by the Council supports this. There is good provision of car parking, but also a good level of public transport provision within both centres and surrounding settlements. Statistics also suggest that the level of crime in both centres has reduced since 2009. Certain areas of the centres have benefited from recent improvements and others are in need of improvement where there is currently a low environmental quality.

10.6. In terms of the convenience foodstore proposed, we estimate that 22% of the turnover of the proposed store will be derived from the Tesco store in Aldershot, 15% from the Asda in Farnborough, 8% from the Morrisons in Farnborough, 5% from the Sainsbury's in Farnborough, and 5% from the Budgens in Aldershot. The remainder of the trade to the proposed foodstore will be drawn from smaller local stores within Aldershot. The assessment of impact shows that there will be minimal impact on the existing stores as a result of the proposed development.

10.7. When factoring in the known commitments, which we have taken into account prior to the implementation of the proposed development, Table 13 illustrates that the expected impacts on Asda in Farnborough will be -6.2%, -4.1% on the Sainsbury's in

Farnborough, -0.3% on the Morrisons in Farnborough, and -32.5% on the Tesco in Aldershot. The majority of these impacts are as a result of the Morrisons development in Aldershot, and the trade diversions predicted by NLP for the Morrisons store have formed the basis for this assessment.

10.8. After then factoring in the proposed development, Table 13 illustrates that the predicted cumulative negative impacts on Asda in Farnborough will be -8.9%, -8.5% on the Sainsbury's in Farnborough, -3.6% on the Morrisons in Farnborough, -9.1% on the Co-op in Aldershot, and -34.1% on the Tesco in Aldershot. Despite the relatively large negative impact on the Tesco store in Aldershot, this store is currently trading significantly above its company average turnover level (as discussed above), and after factoring in known commitments and the proposed development, this store will still be trading at 161% of its company average turnover levels. Therefore, we consider that it is more than capable of withstanding the estimated impacts and it is in any event, an out of centre store. We consider these impacts are acceptable and are not considered a significant adverse impact on either Aldershot or North Camp town centres. This is particularly the case when considered in the context of future growth in population and expenditure in Wellesley.

10.9. Furthermore, the potential impacts are a worst case scenario as the proposed floorspace is a maximum, and clearly a reduction in floorspace will decrease any impacts as a result of the proposed development.

10.10. The proposed foodstore will mainly compete with the existing stores within the catchment area, but outside Aldershot and North Camp centres. Indeed the overtrading at the Tesco store in Aldershot suggests that any trade that will be diverted from the town centre to out of centre stores has already occurred. This existing Tesco store is currently overtrading significantly and the predicted trade diversion to the proposed foodstore will not affect its viability. It will still trade strongly after the impact of the proposal is taken into account reflecting its popularity.

10.11. Some trade will be diverted from Aldershot and North Camp town centres, but this is predicted to be minimal, and the impact from the proposed store is not likely to adversely affect their current trading levels or performance.

10.12. The assessment of the impact of the comparison element of the proposed development and commitments shows that the growth in expenditure between 2012 and 2017 will more than compensate for the predicted trade diversions. Indeed there is an overall increase in turnover in all the centres, both within and outside the catchment area due to the growth in expenditure exceeding the predicted trade diversions to the commitments and proposed development.

10.13. The Local Neighbourhood Centre is a key element of the wider development as it will serve the day to day shopping needs of the new local population and the surrounding area. The development as a whole will provide a sustainable urban extension to Aldershot and the redevelopment of an existing brownfield site that will consists of residential, employment, leisure. service, and retail uses, which will allow for linked trips through a well considered site layout. The Local Neighbourhood Centre will create approximately 460 FTE jobs, specifically the retail element will create approximately 150 FTE jobs. The scheme will generate a total of around 1,210 FTE jobs.

10.14. The proposed development would constitute sustainable economic development and should benefit from the favourable consideration advised by the NPPF. It will provide Wellesley with a sustainable local retail offer and accords with its allocation as a Local Neighbourhood Centre in the adopted Core Strategy. The proposal will deliver a high quality scheme which will deliver wider economic, regeneration and social benefits to Aldershot in line with current Government objectives and national, regional and local planning guidance.

Appendix 1 – Development Zone Plan

KEY

WELLESLEY OUTLINE PLANNING APPLICATION BOUNDARY

A	MAIDA
B	CORUNA
C	CMH
D	MCGRIGOR
E	GUNHILL
F	KNOLLYS
G	PENNEFATHERS
H	STANHOPE LINES WEST
I	SCHOOL END
J	BROWNING
K	STANHOPE LINES EAST
L	NEIGHBOURHOOD CENTRE
M	BULLER
N	GOD'S ACRE
O	MANDORA
P	PEAKED HILL
Q	CLAYTON
R	ABRO
S	REME
T	PARSONS

Wellesley
ALDERSHOT

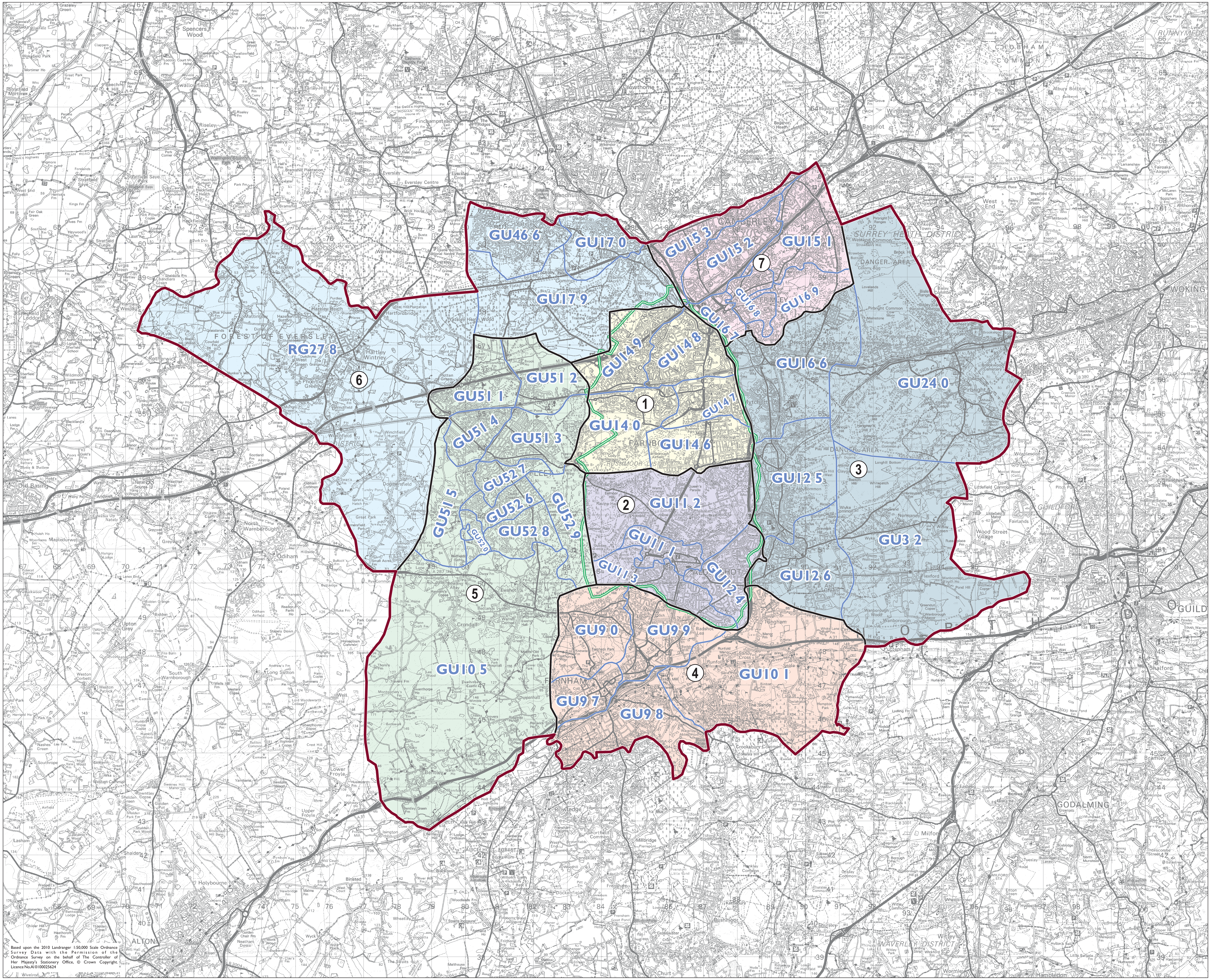
grainger plc
Investing in homes since 1912

Title Development Zone Plan

Drawing No. HPA 2
Scale 1:5000 @ A1
Date 04 December 2012
Drawn by AB

ADAM URBANISM

Appendix 2 – Catchment Area Plan



Study Area

Survey Zones

Postcode Sectors

Rushmoor District Boundary

Plan Title
Study Area, Survey Zones and Postcode Sector Plan

Client
Rushmoor Borough Council

Project
Rushmoor Retail Study 2010

Drawing No
1117909/11

Date
9 July 2010

Project Leader
SH

Scale
1:50,000 @ A1

0 1 2km

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Drawn by
JDS

Appendix 3 – Retail Impact Tables

Table 1 - Population

Zone		2010	2011	2012	2013	2014	2015	2016	2017
1	Farnborough	54,048	54,016	54,097	54,185	54,294	54,243	54,313	54,050
2	Aldershot	36,885	36,863	36,835	37,043	37,144	37,387	38,330	39,033
Total	**Rushmoor**	**90,933**	**90,878**	**90,932**	**91,228**	**91,438**	**91,630**	**92,643**	**93,082**
3	Ash/Deepcut/Brookwood	36,035	36,013	36,035	36,150	36,233	36,302	36,680	36,834
4	Farnham	34,428	34,407	34,428	34,538	34,618	34,683	35,044	35,191
5	Fleet	43,317	43,291	43,317	43,456	43,556	43,638	44,092	44,277
Grand Total		**204,713**	**204,590**	**204,712**	**205,372**	**205,845**	**206,254**	**208,459**	**209,385**

Source: Pitney Bowes Business Insight
Hampshire Council Council

		2011	2012	2013	2014	2015	2016	2017
Notes:	Zone 1 Growth rates	-0.06%	0.15%	0.16%	0.20%	-0.09%	0.13%	-0.48%
	Zone 2 Growth rates	-0.06%	-0.08%	0.57%	0.27%	0.65%	2.52%	1.83%
	Zones 3 - 5 Growth rates	-0.06%	0.06%	0.32%	0.23%	0.19%	1.04%	0.42%

Table 2 - Expenditure per Capita

	2010	2011	2012	2013	2014	2015	2016	2017
Convenience	£2,060	£1,994	£1,972	£1,956	£1,972	£1,993	£2,017	£2,041
Comparison	£3,502	£3,520	£3,534	£3,622	£3,792	£3,986	£4,205	£4,432

Source: Pitney Bowes Business Insight
Pitney Bowes Business Insight Retail Expenditure Guide 2011/2012

Notes:		2011	2012	2013	2014	2015	2016	2017
Convenience								
Special Forms of Trading @	1.6%							
Growth rates =		-3.2%	-1.1%	-0.8%	0.8%	1.1%	1.2%	1.2%
Comparison								
Special Forms of Trading @	8.0%							
Growth rates =		0.5%	0.4%	2.5%	4.7%	5.1%	5.5%	5.4%

2008 Prices

Table 3A - Total Available Convenience Goods Expenditure (£m)

Zone		2010	2011	2012	2013	2014	2015	2016	2017
1	Farnborough	£111.32	£107.69	£106.67	£105.99	£107.05	£108.13	£109.56	£110.34
2	Aldershot	£75.97	£73.49	£72.63	£72.46	£73.24	£74.53	£77.32	£79.68
Total	**Rushmoor**	**£187.29**	**£181.19**	**£179.30**	**£178.44**	**£180.29**	**£182.65**	**£186.89**	**£190.03**
3	Ash/Deepcut/Brookwood	£74.22	£71.80	£71.05	£70.71	£71.44	£72.36	£73.99	£75.20
4	Farnham	£70.91	£68.60	£67.89	£67.56	£68.25	£69.14	£70.69	£71.84
5	Fleet	£89.22	£86.31	£85.41	£85.00	£85.88	£86.99	£88.95	£90.39
Grand Total		**£421.63**	**£407.90**	**£403.65**	**£401.71**	**£405.86**	**£411.14**	**£420.52**	**£427.46**

Source: Tables 1 and 2

2008 Prices

Table 3B - Total Available Comparison Goods Expenditure (£m)

Zone		2010	2011	2012	2013	2014	2015	2016	2017
1	Farnborough	£189.28	£190.11	£191.16	£196.25	£205.89	£216.19	£228.37	£239.54
2	Aldershot	£129.17	£129.74	£130.16	£134.17	£140.86	£149.01	£161.17	£172.98
Total	**Rushmoor**	**£318.45**	**£319.85**	**£321.31**	**£330.42**	**£346.75**	**£365.20**	**£389.54**	**£412.52**
3	Ash/Deepcut/Brookwood	£126.19	£126.75	£127.33	£130.93	£137.40	£144.68	£154.23	£163.24
4	Farnham	£120.57	£121.10	£121.65	£125.09	£131.28	£138.23	£147.35	£155.96
5	Fleet	£151.70	£152.36	£153.06	£157.39	£165.17	£173.92	£185.40	£196.23
Grand Total		**£716.90**	**£720.06**	**£723.36**	**£743.84**	**£780.59**	**£822.04**	**£876.52**	**£927.95**

Source: Tables 1 and 2

2008 Prices

Table 4 - Existing Convenience Retail Provision in Rushmoor

	Net Sales Area (sq m)	% of Convenience Floorspace	Convenience Sales Area (sq m)	Benchmark Turnover (£ per sq m)	Turnover (£m)	Inflow deduction (%)	Turnover (£m)
Farnborough							
Asda	4,624	70%	3,237	£14,562	£47.13	20%	£37.71
Sainsbury's	3,500	75%	2,625	£11,445	£30.04	20%	£24.03
Iceland	400	95%	380	£5,962	£2.27	10%	£2.04
Other TC	500	95%	475	£4,000	£1.90	10%	£1.71
Morrisons	2,332	85%	1,982	£12,302	£24.39	20%	£19.51
Aldershot							
Co-op	735	95%	698	£6,933	£4.84	5%	£4.60
M and S	400	95%	380	£18,983	£7.21	10%	£6.49
Iceland	400	95%	380	£5,962	£2.27	5%	£2.15
Lidl	1,050	85%	893	£2,677	£2.39	5%	£2.27
Other TC	700	95%	665	£4,000	£2.66	5%	£2.53
Morrisons	4,069	90%	3,662	£12,302	£45.05	10%	£40.55
					£0.00		
Tesco	5,052	75%	3,789	£11,918	£45.16	10%	£40.64
North Camp							
Co-op	200	95%	190	£6,933	£1.32	5%	£1.25
Other TC	400	100%	400	£4,000	£1.60	5%	£1.52

Source: Sales Density - Mintel UK Retail Rankings 2012 and Verdict 2011 adjusted by Savills to 2008 Prices, and DPP Retail Study
Floorspace - DPP Retail Study 2012, GOAD, site surveys

Notes: Morrisons in Aldershot included as per DPP Study - store not constructed

Table 5 - Convenience Goods Market Shares

	Main Food						Top Up				
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Asda, Princes Mead Shopping Centre, Farnborough	29.7%	8.0%	9.4%	3.1%	1.1%		16.7%	1.3%	4.5%	0.0%	0.0%
Sainsburys, Kingsmead Centre, Farnborough	8.8%	1.0%	2.1%	1.0%	1.1%		9.0%	0.0%	0.0%	1.5%	0.0%
Iceland, Queensmead, Farnborough	0.0%	1.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Summit Avenue, Southwood, Farnborough	22.0%	2.1%	2.1%	0.0%	2.1%		20.5%	0.0%	0.0%	0.0%	0.0%
Co-op Welcome, Woburn Avenue, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		12.8%	0.0%	0.0%	0.0%	0.0%
Londis, Fernhill Road, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Londis, Medway Drive, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Budgens Express, Farnborough Raod, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op Welcome, Fernhill Road, Cove, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		7.7%	0.0%	0.0%	0.0%	0.0%
One Stop, Cove Road, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		1.3%	0.0%	0.0%	0.0%	0.0%
Co-op Victoria Road, Aldershot	0.0%	1.0%	0.0%	2.0%	0.0%		0.0%	6.5%	0.0%	8.8%	0.0%
M and S, Union Street, Aldershot	0.0%	0.0%	0.0%	7.1%	0.0%		0.0%	5.2%	4.5%	8.8%	0.0%
Iceland, Victoria Road, Aldershot	1.1%	0.0%	0.0%	1.0%	0.0%		0.0%	5.2%	0.0%	7.4%	0.0%
Spar, High Street, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	1.5%	4.4%	0.0%
Lidl, Wellington Centre, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Wellington Avenue, Aldershot	8.8%	57.6%	41.7%	51.0%	11.7%		0.0%	13.0%	4.5%	11.8%	1.3%
Bookers Cash & Carry, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, North Lane, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	4.4%	0.0%
Co-op Welcome, Queens Road, North Camp, Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%		6.4%	5.2%	0.0%	4.4%	2.7%
Co-op, Queens Road, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Ash Street, Ash, Aldershot	0.0%	1.0%	0.0%	0.0%	0.0%		0.0%	13.0%	0.0%	8.8%	0.0%
One Stop, Lower Farm Road, Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	5.2%	0.0%	0.0%	0.0%
Budgens, Wharf Road, Ash Vale, Aldershot	0.0%	1.0%	2.1%	0.0%	0.0%		1.3%	5.2%	32.8%	0.0%	0.0%
Sainsburys, Water Lane, Farnham	0.0%	23.2%	9.4%	28.6%	2.1%		0.0%	10.4%	0.0%	8.8%	0.0%
Sainsburys Farnham Town Centre	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, The Woolmead, East Street, Farnham	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	1.5%	0.0%
Lidl, Dogflud Way, Farnham	0.0%	1.0%	0.0%	2.0%	0.0%		0.0%	0.0%	0.0%	1.5%	0.0%
Londis, The Street, Tongham, Farnham	0.0%	1.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Ridgeway Road, Farnham	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Upper Hale Road, Farnham	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	2.9%	0.0%
Waitrose, The Hart, Farnham	0.0%	0.0%	0.0%	1.0%	2.1%		0.0%	1.3%	1.5%	0.0%	0.0%
Aldi, London Road, Blackwater Camberley	1.1%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Upper College Ride, Camberley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, The Atrium, Charles Street, Camberley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
One Stop, The Green, Frimley Green, Camberley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	1.5%	0.0%	0.0%
Sainsburys, Blackwater, Valley Road, Watchmoor Park, Camberley	12.1%	0.0%	17.7%	0.0%	4.3%		3.8%	1.3%	7.5%	0.0%	0.0%
Sainsburys, Cambridge Walk, Camberley	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	1.5%	0.0%	0.0%
Sainsburys, Heather Ridge Arcade, Camberley	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	3.0%	0.0%	0.0%
Tesco Express, Balmoral Drive, Frimley, Camberley	0.0%	0.0%	0.0%	1.0%	2.1%		0.0%	0.0%	4.5%	0.0%	0.0%
Waitrose, High Street, Frimley, Camberley	2.2%	0.0%	2.1%	0.0%	0.0%		0.0%	0.0%	6.0%	0.0%	0.0%
Iceland, Fleet Road, Fleet	0.0%	0.0%	0.0%	0.0%	0.0%		1.3%	0.0%	0.0%	0.0%	0.0%
M and S Simply Food, Fleet	0.0%	0.0%	0.0%	0.0%	1.1%		0.0%	0.0%	0.0%	0.0%	2.7%
Morrisons, Elvetham Heath, Fleet	0.0%	1.0%	1.0%	0.0%	24.5%		0.0%	1.3%	0.0%	0.0%	9.3%
Sainsburys, Fleet Road, Fleet	1.1%	0.0%	0.0%	0.0%	12.8%		0.0%	0.0%	0.0%	0.0%	10.7%
Londis, Northfield Road, Church Crookham, Fleet	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	1.3%
Spar, Linkway Parade, Fleet	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	5.3%
Tesco Express, Falkner Close, Ancells Farm, Fleet	0.0%	0.0%	0.0%	0.0%	1.1%		2.6%	0.0%	0.0%	0.0%	10.7%
Tesco Express, Reading Road South, Church Crookham, Fleet	0.0%	0.0%	0.0%	0.0%	1.1%		0.0%	0.0%	0.0%	0.0%	9.3%
Waitrose, The Hart Centre, Fleet	1.1%	0.0%	0.0%	0.0%	31.9%		0.0%	0.0%	0.0%	0.0%	24.0%
Asda, Lower Earley District Centre, Reading	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Costco, South Oak Way, Reading	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Napier Road, Reading	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Knaphill	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	1.5%	0.0%	0.0%
Morrisons, Goldsworth Road, Woking	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, Redding Way, Knaphill, Woking	0.0%	0.0%	3.1%	0.0%	0.0%		0.0%	0.0%	1.5%	0.0%	1.3%
Spar, High Street, Horsell, Woking	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, The Goldsworth Park Centre, Woking	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	1.5%	0.0%	0.0%
M and S, High Street, Guildford	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, Clay Lane, Burpham, Guildford	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, High Street, Guildford	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Ashenden Road, Guildford	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	3.0%	0.0%	0.0%
Costcutters, Elizabeth Parade, Tudor Drive, Yateley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Tresham Crescent, Yateley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Tresham Cresent, Yateley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Reading Road, Yateley	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, The Meadows, Marshall Road, College Town, Sandhurst	8.8%	1.0%	1.0%	0.0%	1.1%		2.6%	0.0%	0.0%	0.0%	0.0%
M and S, The Meadows, Marshall Road, College Town, Sandhurst	2.2%	0.0%	0.0%	1.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, London Road, Blackwater, Camberley	1.1%	0.0%	0.0%	0.0%	0.0%		0.0%	1.3%	0.0%	0.0%	0.0%
Morrisons, Churchill Way West, Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys Local, Station Mall, Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Chineham Shopping Centre, Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys , Emerson Way, Emersons Green, Bristol	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Salisbury Street, Fordingbridge	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Caledonian Road, Kings Cross, London	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Station Road, Hook	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Station Raod, Addlestone	0.0%	0.0%	1.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Budgens, Guildford Road, Lightwater	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, Bridge Way, Cobham	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	1.3%	0.0%	0.0%	0.0%
Local Shops	0.0%	0.0%	2.1%	1.0%	0.0%		14.1%	23.4%	19.4%	25.0%	21.3%
Total	**100%**	**100%**	**100%**	**100%**	**100%**		**100%**	**100%**	**100%**	**100%**	**100%**

Source: Question 1 and 5 of NEMS Household Survey 2010

Table 6 - Convenience Goods Turnover 2012 (£m)

	Main Food						Top Up					Total
	75%						25%					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	
Expenditure	**£80.00**	**£54.47**	**£53.29**	**£50.91**	**£64.06**		**£26.67**	**£18.16**	**£17.76**	**£16.97**	**£21.35**	**£403.65**
Asda, Princes Mead Shopping Centre, Farnborough	£23.74	£4.38	£5.00	£1.56	£0.68		£4.44	£0.24	£0.80	£0.00	£0.00	£40.82
Sainsburys, Kingsmead Centre, Farnborough	£7.03	£0.56	£1.11	£0.52	£0.68		£2.39	£0.00	£0.00	£0.25	£0.00	£12.55
Iceland, Queensmead, Farnborough	£0.00	£0.56	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Morrisons, Summit Avenue, Southwood, Farnborough	£17.58	£1.12	£1.11	£0.00	£1.36		£5.47	£0.00	£0.00	£0.00	£0.00	£26.65
Co-op Welcome, Woburn Avenue, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£3.42	£0.00	£0.00	£0.00	£0.00	£3.42
Londis, Fernhill Road, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Londis, Medway Drive, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Budgens Express, Farnborough Raod, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op Welcome, Fernhill Road, Cove, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£2.05	£0.00	£0.00	£0.00	£0.00	£2.05
One Stop, Cove Road, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.34	£0.00	£0.00	£0.00	£0.00	£0.34
Co-op Victoria Road, Aldershot	£0.00	£0.56	£0.00	£1.04	£0.00		£0.00	£1.18	£0.00	£1.50	£0.00	£4.28
M and S, Union Street, Aldershot	£0.00	£0.00	£0.00	£3.64	£0.00		£0.00	£0.94	£0.80	£1.50	£0.00	£6.87
Iceland, Victoria Road, Aldershot	£0.88	£0.00	£0.00	£0.52	£0.00		£0.00	£0.94	£0.00	£1.25	£0.00	£3.59
Spar, High Street, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.27	£0.75	£0.00	£1.01
Lidl, Wellington Centre, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Wellington Avenue, Aldershot	£7.03	£31.36	£22.20	£25.98	£7.50		£0.00	£2.36	£0.80	£2.00	£0.28	£99.50
Bookers Cash & Carry, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, North Lane, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.75	£0.00	£0.75
Co-op Welcome, Queens Road, North Camp, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£1.71	£0.94	£0.00	£0.75	£0.57	£3.97
Co-op, Queens Road, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Ash Street, Ash, Aldershot	£0.00	£0.56	£0.00	£0.00	£0.00		£0.00	£2.36	£0.00	£1.50	£0.00	£4.42
One Stop, Lower Farm Road, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.94	£0.00	£0.00	£0.00	£0.94
Budgens, Wharf Road, Ash Vale, Aldershot	£0.00	£0.56	£1.11	£0.00	£0.00		£0.34	£0.94	£5.83	£0.00	£0.00	£8.79
Sainsburys, Water Lane, Farnham	£0.00	£12.62	£5.00	£14.55	£1.36		£0.00	£1.89	£0.00	£1.50	£0.00	£36.91
Sainsburys Farnham Town Centre	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Iceland, The Woolmead, East Street, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.25	£0.00	£0.25
Lidl, Dogflud Way, Farnham	£0.00	£0.56	£0.00	£1.04	£0.00		£0.00	£0.00	£0.00	£0.25	£0.00	£1.85
Londis, The Street, Tongham, Farnham	£0.00	£0.56	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Tesco Express, Ridgeway Road, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco Express, Upper Hale Road, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.50	£0.00	£0.50
Waitrose, The Hart, Farnham	£0.00	£0.00	£0.00	£0.52	£1.36		£0.00	£0.24	£0.27	£0.00	£0.00	£2.38
Aldi, London Road, Blackwater Camberley	£0.88	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.88
Co-op, Upper College Ride, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, The Atrium, Charles Street, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
One Stop, The Green, Frimley Green, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.27	£0.00	£0.00	£0.27
Sainsburys, Blackwater, Valley Road, Watchmoor Park, Camberley	£9.67	£0.00	£9.44	£0.00	£2.73		£1.03	£0.24	£1.33	£0.00	£0.00	£24.42
Sainsburys, Cambridge Walk, Camberley	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.27	£0.00	£0.00	£0.82
Sainsburys, Heather Ridge Arcade, Camberley	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.53	£0.00	£0.00	£1.09
Tesco Express, Balmoral Drive, Frimley, Camberley	£0.00	£0.00	£0.00	£0.52	£1.36		£0.00	£0.00	£0.80	£0.00	£0.00	£2.68
Waitrose, High Street, Frimley, Camberley	£1.76	£0.00	£1.11	£0.00	£0.00		£0.00	£0.00	£1.06	£0.00	£0.00	£3.93
Iceland, Fleet Road, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.34	£0.00	£0.00	£0.00	£0.00	£0.34
M and S Simply Food, Fleet	£0.00	£0.00	£0.00	£0.00	£0.68		£0.00	£0.00	£0.00	£0.00	£0.57	£1.25
Morrisons, Elvetham Heath, Fleet	£0.00	£0.56	£0.56	£0.00	£15.67		£0.00	£0.24	£0.00	£0.00	£1.99	£19.02
Sainsburys, Fleet Road, Fleet	£0.88	£0.00	£0.00	£0.00	£8.18		£0.00	£0.00	£0.00	£0.00	£2.28	£11.33
Londis, Northfield Road, Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.28	£0.28
Spar, Linkway Parade, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£1.14	£1.14
Tesco Express, Falkner Close, Ancells Farm, Fleet	£0.00	£0.00	£0.00	£0.00	£0.68		£0.68	£0.00	£0.00	£0.00	£2.28	£3.64
Tesco Express, Reading Road South, Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£0.68		£0.00	£0.00	£0.00	£0.00	£1.99	£2.67
Waitrose, The Hart Centre, Fleet	£0.88	£0.00	£0.00	£0.00	£20.44		£0.00	£0.00	£0.00	£0.00	£5.12	£26.45
Asda, Lower Earley District Centre, Reading	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costco, South Oak Way, Reading	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Tesco, Napier Road, Reading	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, High Street, Knaphill	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.27	£0.00	£0.00	£0.27
Morrisons, Goldsworth Road, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Redding Way, Knaphill, Woking	£0.00	£0.00	£1.67	£0.00	£0.00		£0.00	£0.00	£0.27	£0.00	£0.28	£2.22
Spar, High Street, Horsell, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Waitrose, The Goldsworth Park Centre, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.27	£0.00	£0.00	£0.27
M and S, High Street, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Clay Lane, Burpham, Guildford	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Sainsburys, High Street, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Ashenden Road, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.53	£0.00	£0.00	£0.53
Costcutters, Elizabeth Parade, Tudor Drive, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Waitrose, Tresham Crescent, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Tresham Cresent, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Reading Road, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, The Meadows, Marshall Road, College Town, Sandhurst	£7.03	£0.56	£0.56	£0.00	£0.68		£0.68	£0.00	£0.00	£0.00	£0.00	£9.51
M and S, The Meadows, Marshall Road, College Town, Sandhurst	£1.76	£0.00	£0.00	£0.52	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£2.28
Lidl, London Road, Blackwater, Camberley	£0.88	£0.00	£0.00	£0.00	£0.00		£0.00	£0.24	£0.00	£0.00	£0.00	£1.11
Morrisons, Churchill Way West, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys Local, Station Mall, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Chineham Shopping Centre, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys , Emerson Way, Emersons Green, Bristol	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco Express, Salisbury Street, Fordingbridge	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Caledonian Road, Kings Cross, London	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Station Road, Hook	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Station Raod, Addlestone	£0.00	£0.00	£0.56	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.56
Budgens, Guildford Road, Lightwater	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Bridge Way, Cobham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.24	£0.00	£0.00	£0.00	£0.24
Local Shops	£0.00	£0.00	£1.11	£0.52	£0.00		£3.76	£4.24	£3.45	£4.24	£4.56	£21.88
Total	**£80.00**	**£54.53**	**£53.29**	**£50.91**	**£64.06**		**£26.67**	**£18.16**	**£17.76**	**£16.97**	**£21.35**	**£403.71**

Source: Tables 3a and 5

2008 Prices

Table 7 - Convenience Goods Turnover 2017 (£m)

	Main Food						Top Up					Total
	75%						25%					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	
Expenditure	**£82.76**	**£59.76**	**£56.40**	**£53.88**	**£67.79**		**£27.59**	**£19.92**	**£18.80**	**£17.96**	**£22.60**	**£427.46**
Asda, Princes Mead Shopping Centre, Farnborough	£24.55	£4.80	£5.29	£1.65	£0.72		£4.60	£0.26	£0.84	£0.00	£0.00	£42.71
Sainsburys, Kingsmead Centre, Farnborough	£7.28	£0.62	£1.17	£0.55	£0.72		£2.48	£0.00	£0.00	£0.26	£0.00	£13.08
Iceland, Queensmead, Farnborough	£0.00	£0.62	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.62
Morrisons, Summit Avenue, Southwood, Farnborough	£18.19	£1.23	£1.17	£0.00	£1.44		£5.66	£0.00	£0.00	£0.00	£0.00	£27.70
Co-op Welcome, Woburn Avenue, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£3.54	£0.00	£0.00	£0.00	£0.00	£3.54
Londis, Fernhill Road, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Londis, Medway Drive, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Budgens Express, Farnborough Raod, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op Welcome, Fernhill Road, Cove, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£2.12	£0.00	£0.00	£0.00	£0.00	£2.12
One Stop, Cove Road, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£0.35	£0.00	£0.00	£0.00	£0.00	£0.35
Co-op Victoria Road, Aldershot	£0.00	£0.62	£0.00	£1.10	£0.00		£0.00	£1.29	£0.00	£1.58	£0.00	£4.59
M and S, Union Street, Aldershot	£0.00	£0.00	£0.00	£3.85	£0.00		£0.00	£1.03	£0.84	£1.58	£0.00	£7.31
Iceland, Victoria Road, Aldershot	£0.91	£0.00	£0.00	£0.55	£0.00		£0.00	£1.03	£0.00	£1.32	£0.00	£3.81
Spar, High Street, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.28	£0.79	£0.00	£1.07
Lidl, Wellington Centre, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Wellington Avenue, Aldershot	£7.28	£34.41	£23.50	£27.49	£7.93		£0.00	£2.59	£0.84	£2.11	£0.30	£106.45
Bookers Cash & Carry, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, North Lane, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.79	£0.00	£0.79
Co-op Welcome, Queens Road, North Camp, Farnborough	£0.00	£0.00	£0.00	£0.00	£0.00		£1.77	£1.03	£0.00	£0.79	£0.60	£4.20
Co-op, Queens Road, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Ash Street, Ash, Aldershot	£0.00	£0.62	£0.00	£0.00	£0.00		£0.00	£2.59	£0.00	£1.58	£0.00	£4.79
One Stop, Lower Farm Road, Aldershot	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£1.03	£0.00	£0.00	£0.00	£1.03
Budgens, Wharf Road, Ash Vale, Aldershot	£0.00	£0.62	£1.17	£0.00	£0.00		£0.35	£1.03	£6.17	£0.00	£0.00	£9.35
Sainsburys, Water Lane, Farnham	£0.00	£13.85	£5.29	£15.39	£1.44		£0.00	£2.07	£0.00	£1.58	£0.00	£39.63
Sainsburys Farnham Town Centre	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.59
Iceland, The Woolmead, East Street, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.26	£0.00	£0.26
Lidl, Dogflud Way, Farnham	£0.00	£0.62	£0.00	£1.10	£0.00		£0.00	£0.00	£0.00	£0.26	£0.00	£1.98
Londis, The Street, Tongham, Farnham	£0.00	£0.62	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.62
Tesco Express, Ridgeway Road, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco Express, Upper Hale Road, Farnham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.53	£0.00	£0.53
Waitrose, The Hart, Farnham	£0.00	£0.00	£0.00	£0.55	£1.44		£0.00	£0.26	£0.28	£0.00	£0.00	£2.53
Aldi, London Road, Blackwater Camberley	£0.91	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.91
Co-op, Upper College Ride, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lidl, The Atrium, Charles Street, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
One Stop, The Green, Frimley Green, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.28	£0.00	£0.00	£0.28
Sainsburys, Blackwater, Valley Road, Watchmoor Park, Camberley	£10.00	£0.00	£9.99	£0.00	£2.88		£1.06	£0.26	£1.40	£0.00	£0.00	£25.60
Sainsburys, Cambridge Walk, Camberley	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.28	£0.00	£0.00	£0.87
Sainsburys, Heather Ridge Arcade, Camberley	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.56	£0.00	£0.00	£1.15
Tesco Express, Balmoral Drive, Frimley, Camberley	£0.00	£0.00	£0.00	£0.55	£1.44		£0.00	£0.00	£0.84	£0.00	£0.00	£2.83
Waitrose, High Street, Frimley, Camberley	£1.82	£0.00	£1.17	£0.00	£0.00		£0.00	£0.00	£1.12	£0.00	£0.00	£4.12
Iceland, Fleet Road, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.35	£0.00	£0.00	£0.00	£0.00	£0.35
M and S Simply Food, Fleet	£0.00	£0.00	£0.00	£0.00	£0.72		£0.00	£0.00	£0.00	£0.00	£0.60	£1.32
Morrisons, Elvetham Heath, Fleet	£0.00	£0.62	£0.59	£0.00	£16.59		£0.00	£0.26	£0.00	£0.00	£2.11	£20.16
Sainsburys, Fleet Road, Fleet	£0.91	£0.00	£0.00	£0.00	£8.65		£0.00	£0.00	£0.00	£0.00	£2.41	£11.97
Londis, Northfield Road, Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.30	£0.30
Spar, Linkway Parade, Fleet	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£1.21	£1.21
Tesco Express, Falkner Close, Ancells Farm, Fleet	£0.00	£0.00	£0.00	£0.00	£0.72		£0.71	£0.00	£0.00	£0.00	£2.41	£3.84
Tesco Express, Reading Road South, Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£0.72		£0.00	£0.00	£0.00	£0.00	£2.11	£2.83
Waitrose, The Hart Centre, Fleet	£0.91	£0.00	£0.00	£0.00	£21.64		£0.00	£0.00	£0.00	£0.00	£5.42	£27.97
Asda, Lower Earley District Centre, Reading	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Costco, South Oak Way, Reading	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.59
Tesco, Napier Road, Reading	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, High Street, Knaphill	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.28	£0.00	£0.00	£0.28
Morrisons, Goldsworth Road, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Redding Way, Knaphill, Woking	£0.00	£0.00	£1.76	£0.00	£0.00		£0.00	£0.00	£0.28	£0.00	£0.30	£2.34
Spar, High Street, Horsell, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Waitrose, The Goldsworth Park Centre, Woking	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.28	£0.00	£0.00	£0.28
M and S, High Street, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Clay Lane, Burpham, Guildford	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.59
Sainsburys, High Street, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Ashenden Road, Guildford	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.56	£0.00	£0.00	£0.56
Costcutters, Elizabeth Parade, Tudor Drive, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Waitrose, Tresham Crescent, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Tresham Cresent, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Co-op, Reading Road, Yateley	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, The Meadows, Marshall Road, College Town, Sandhurst	£7.28	£0.62	£0.59	£0.00	£0.72		£0.71	£0.00	£0.00	£0.00	£0.00	£9.91
M and S, The Meadows, Marshall Road, College Town, Sandhurst	£1.82	£0.00	£0.00	£0.55	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£2.37
Lidl, London Road, Blackwater, Camberley	£0.91	£0.00	£0.00	£0.00	£0.00		£0.00	£0.26	£0.00	£0.00	£0.00	£1.17
Morrisons, Churchill Way West, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys Local, Station Mall, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Chineham Shopping Centre, Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys , Emerson Way, Emersons Green, Bristol	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco Express, Salisbury Street, Fordingbridge	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Caledonian Road, Kings Cross, London	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Station Road, Hook	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tesco, Station Raod, Addlestone	£0.00	£0.00	£0.59	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.59
Budgens, Guildford Road, Lightwater	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sainsburys, Bridge Way, Cobham	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.26	£0.00	£0.00	£0.00	£0.26
Local Shops	£0.00	£0.00	£1.17	£0.55	£0.00		£3.89	£4.66	£3.65	£4.49	£4.82	£23.23
Total	**£82.76**	**£59.82**	**£56.40**	**£53.88**	**£67.79**		**£27.59**	**£19.92**	**£18.80**	**£17.96**	**£22.60**	**£427.52**

Source: Tables 3a and 5

2008 Prices

Table 8 Comparison Goods Market Shares

Table 8a Clothes and Shoes

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Aldershot	2.5%	28.0%	11.4%	24.0%	0.0%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	18.5%	9.7%	2.3%	4.2%	33.7%
Bracknell	0.0%	0.0%	0.0%	0.0%	0.0%
Camberley	24.7%	16.1%	22.7%	17.7%	18.6%
Farnborough	28.4%	4.3%	12.5%	4.2%	4.7%
Farnham	2.5%	3.2%	2.3%	5.2%	5.8%
Fleet	0.0%	0.0%	1.1%	0.0%	14.0%
Frimley	0.0%	0.0%	0.0%	0.0%	0.0%
Godalming	0.0%	0.0%	0.0%	0.0%	0.0%
Guildford	12.3%	25.8%	36.4%	31.3%	7.0%
London	0.0%	1.1%	0.0%	1.0%	1.2%
Reading	2.5%	3.2%	1.1%	4.2%	9.3%
Sandhurst	6.2%	0.0%	3.4%	2.1%	1.2%
Windsor	0.0%	0.0%	0.0%	0.0%	0.0%
Woking	1.2%	1.1%	6.8%	6.3%	0.0%
Wokingham	0.0%	0.0%	0.0%	0.0%	0.0%
Abroad	1.2%	0.0%	0.0%	0.0%	1.2%
Bath Avon	0.0%	0.0%	0.0%	0.0%	1.2%
Bristol Avon	0.0%	0.0%	0.0%	0.0%	0.0%
Chichester, West Sussex	0.0%	1.1%	0.0%	0.0%	0.0%
Deal, Kent	0.0%	1.1%	0.0%	0.0%	0.0%
Fosbury, Malborough, Wiltshire	0.0%	0.0%	0.0%	0.0%	1.2%
Kingston upon Thames, Surrey	0.0%	1.1%	0.0%	0.0%	1.2%
Portsmouth, Hampshire	0.0%	1.1%	0.0%	0.0%	0.0%
Slough, Berkshire	0.0%	0.0%	0.0%	0.0%	0.0%
Southampton, Hampshire	0.0%	1.1%	0.0%	0.0%	0.0%
Sutton, Surrey	0.0%	1.1%	0.0%	0.0%	0.0%
Swindon, Wiltshire	0.0%	1.1%	0.0%	0.0%	0.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Question 10 NEMS Household Survey 2010

Table 8b Domestic Electric Appliances

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Aldershot	0.0%	10.5%	2.6%	9.5%	1.5%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	0.0%	0.0%	0.0%	0.0%	1.5%
Bracknell	0.0%	0.0%	0.0%	0.0%	0.0%
Camberley	5.5%	1.2%	6.4%	1.4%	1.5%
Farnborough	86.3%	73.3%	64.1%	64.9%	50.7%
Farnham	1.4%	5.8%	1.3%	8.1%	0.0%
Fleet	2.7%	0.0%	0.0%	0.0%	31.3%
Frimley	0.0%	0.0%	3.8%	1.4%	1.5%
Godalming	0.0%	0.0%	0.0%	0.0%	0.0%
Guildford	0.0%	3.5%	11.5%	6.8%	0.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%
Reading	2.7%	1.2%	0.0%	0.0%	9.0%
Sandhurst	1.4%	0.0%	0.0%	0.0%	1.5%
Windsor	0.0%	0.0%	0.0%	0.0%	0.0%
Woking	0.0%	0.0%	0.0%	0.0%	0.0%
Wokingham	0.0%	0.0%	0.0%	0.0%	0.0%
Crowthorne, Berkshire	0.0%	0.0%	0.0%	0.0%	0.0%
Farnborough Gate Retail Park	0.0%	4.7%	9.0%	8.1%	0.0%
High Wycombe, Buckinghamshire	0.0%	0.0%	0.0%	0.0%	0.0%
Kingston upon Thames, Surrey	0.0%	0.0%	0.0%	0.0%	1.5%
Slough, Berkshire	0.0%	0.0%	1.3%	0.0%	0.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Question 12 NEMS Household Survey 2010

Table 8c Furniture, Soft Furnishings or Floor Coverings

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Aldershot	5.7%	28.8%	13.1%	19.4%	0.0%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	1.4%	1.4%	1.6%	0.0%	4.8%
Bracknell	0.0%	0.0%	0.0%	1.6%	3.2%
Camberley	2.9%	6.8%	3.3%	3.2%	8.1%
Farnborough	70.0%	37.0%	36.1%	41.9%	27.4%
Farnham	0.0%	9.6%	6.6%	1.6%	4.8%
Fleet	1.4%	1.4%	0.0%	1.6%	32.3%
Frimley	0.0%	1.4%	0.0%	0.0%	1.6%
Godalming	0.0%	0.0%	0.0%	1.6%	0.0%
Guildford	1.4%	11.0%	19.7%	16.1%	1.6%
London	1.4%	0.0%	0.0%	1.6%	0.0%
Reading	2.9%	1.4%	3.3%	3.2%	11.3%
Sandhurst	4.3%	0.0%	0.0%	0.0%	0.0%
Windsor	0.0%	0.0%	0.0%	0.0%	0.0%
Woking	1.4%	0.0%	4.9%	0.0%	0.0%
Wokingham	0.0%	0.0%	0.0%	0.0%	0.0%
Ash Vale, Aldershot	1.4%	1.4%	9.8%	1.6%	0.0%
Bagshot, Surrey	0.0%	0.0%	0.0%	0.0%	0.0%
Birmignham, West Midlands	1.4%	0.0%	0.0%	0.0%	0.0%
Bognor Regis, West Sussex	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge	0.0%	0.0%	0.0%	1.6%	0.0%
Croydon, Surrey	0.0%	0.0%	0.0%	1.6%	0.0%
Darlington, County Durham	0.0%	0.0%	0.0%	0.0%	0.0%
Door to Dorr Salesman	0.0%	0.0%	0.0%	0.0%	1.6%
Farnborough Gate Retail Park	0.0%	0.0%	1.6%	0.0%	0.0%
Hartley Wintney, Hook, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
High Wycombe, Buckinghamshire	0.0%	0.0%	0.0%	0.0%	0.0%
Hook, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Kingston upon Thames, Surrey	1.4%	0.0%	0.0%	1.6%	1.6%
Southampton, Hampshire	0.0%	0.0%	0.0%	1.6%	1.6%
Wembley, Middlesex	2.9%	0.0%	0.0%	0.0%	0.0%
Yateley, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Question 16 NEMS Household Survey 2010

Table 8d DIY / hardware or Garden Items

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Aldershot	1.1%	21.5%	5.6%	27.7%	2.2%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	0.0%	0.0%	1.1%	0.0%	0.0%
Bracknell	0.0%	0.0%	0.0%	0.0%	0.0%
Camberley	0.0%	0.0%	1.1%	0.0%	6.7%
Farnborough	91.1%	63.4%	83.1%	45.7%	71.9%
Farnham	2.2%	10.8%	2.2%	23.4%	1.1%
Fleet	2.2%	0.0%	0.0%	0.0%	18.0%
Frimley	0.0%	0.0%	0.0%	0.0%	0.0%
Godalming	1.1%	0.0%	0.0%	0.0%	0.0%
Guildford	0.0%	2.2%	4.5%	2.1%	0.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%
Reading	0.0%	0.0%	0.0%	0.0%	0.0%
Sandhurst	1.1%	0.0%	0.0%	0.0%	0.0%
Windsor	0.0%	0.0%	0.0%	0.0%	0.0%
Woking	0.0%	0.0%	1.1%	0.0%	0.0%
Wokingham	0.0%	0.0%	0.0%	0.0%	0.0%
Ash Vale, Aldershot	0.0%	1.1%	0.0%	0.0%	0.0%
Bagshot, Surrey	1.1%	0.0%	0.0%	1.1%	0.0%
Blackwater, Camberley, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Farnborough Gate Retail Park	0.0%	0.0%	1.1%	0.0%	0.0%
Hook, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
North Town, Aldershot	0.0%	1.1%	0.0%	0.0%	0.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Question 18 NEMS Household Survey 2010

Table 8e Other Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Aldershot	3.3%	73.0%	40.4%	79.6%	4.2%
Alton	0.0%	0.0%	0.0%	0.0%	0.0%
Basingstoke	0.0%	0.0%	0.0%	0.0%	0.0%
Bracknell	0.0%	0.0%	0.0%	0.0%	0.0%
Camberley	12.1%	1.0%	11.2%	0.0%	1.1%
Farnborough	78.0%	6.0%	23.6%	3.2%	3.2%
Farnham	1.1%	13.0%	1.1%	14.0%	2.1%
Fleet	3.3%	0.0%	1.1%	0.0%	85.3%
Frimley	0.0%	0.0%	4.5%	0.0%	0.0%
Godalming	0.0%	0.0%	0.0%	0.0%	0.0%
Guildford	0.0%	5.0%	6.7%	3.2%	0.0%
London	0.0%	0.0%	0.0%	0.0%	0.0%
Reading	0.0%	0.0%	0.0%	0.0%	0.0%
Sandhurst	2.2%	1.0%	1.1%	0.0%	0.0%
Windsor	0.0%	0.0%	0.0%	0.0%	0.0%
Woking	0.0%	0.0%	6.7%	0.0%	0.0%
Wokingham	0.0%	0.0%	0.0%	0.0%	0.0%
Ash Vale, Aldershot	0.0%	0.0%	2.2%	0.0%	0.0%
Blackwater, Camberley	0.0%	0.0%	0.0%	0.0%	0.0%
Church Crookham, Fleet	0.0%	0.0%	0.0%	0.0%	4.2%
Dorking, Surrey	0.0%	0.0%	0.0%	0.0%	0.0%
Hartley Wintney, Hook, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Hook, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Kingston upon Thames, Surrey	0.0%	1.0%	0.0%	0.0%	0.0%
Pirbright, Woking, Surrey	0.0%	0.0%	1.1%	0.0%	0.0%
Yateley, Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Question 20 NEMS Household Survey 2010

Notes: Other Goods' include: Chemist Goods
Jewellery/Watches/Clocks
Non-durable Household Goods
Bicycles
Recreational Goods
Other Miscellaneous Goods

Table 9 Comparison Goods Turnover 2012 (£m)

Table 9a Clothes and Shoes

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£44.54**	**£30.33**	**£29.67**	**£28.35**	**£35.66**	**£168.54**
Aldershot	£1.1	£8.5	£3.4	£6.8	£0.0	£19.74
Alton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Basingstoke	£8.2	£2.9	£0.7	£1.2	£12.0	£25.06
Bracknell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Camberley	£11.0	£4.9	£6.7	£5.0	£6.6	£34.29
Farnborough	£12.6	£1.3	£3.7	£1.2	£1.7	£20.50
Farnham	£1.1	£1.0	£0.7	£1.5	£2.1	£6.30
Fleet	£0.0	£0.0	£0.3	£0.0	£5.0	£5.31
Frimley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Godalming	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Guildford	£5.5	£7.8	£10.8	£8.9	£2.5	£35.46
London	£0.0	£0.3	£0.0	£0.3	£0.4	£1.04
Reading	£1.1	£1.0	£0.3	£1.2	£3.3	£6.91
Sandhurst	£2.7	£0.0	£1.0	£0.6	£0.4	£4.77
Windsor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Woking	£0.5	£0.3	£2.0	£1.8	£0.0	£4.67
Wokingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Abroad	£0.5	£0.0	£0.0	£0.0	£0.4	£0.96
Bath Avon	£0.0	£0.0	£0.0	£0.0	£0.4	£0.41
Bristol Avon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Chichester, West Sussex	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Deal, Kent	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Fosbury, Malborough, Wiltshire	£0.0	£0.0	£0.0	£0.0	£0.4	£0.41
Kingston upon Thames, Surrey	£0.0	£0.3	£0.0	£0.0	£0.4	£0.74
Portsmouth, Hampshire	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Slough, Berkshire	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Southampton, Hampshire	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Sutton, Surrey	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Swindon, Wiltshire	£0.0	£0.3	£0.0	£0.0	£0.0	£0.33
Total	**£44.54**	**£30.33**	**£29.67**	**£28.35**	**£35.66**	**£168.54**

Source: Tables 3b and 8a

Table 9b Domestic Electric Appliances

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£31.73**	**£21.61**	**£21.14**	**£20.19**	**£25.41**	**£120.08**
Aldershot	£0.00	£2.26	£0.54	£1.91	£0.38	£5.09
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.38	£0.38
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£1.74	£0.25	£1.35	£0.27	£0.38	£4.00
Farnborough	£27.38	£15.83	£13.55	£13.10	£12.89	£82.76
Farnham	£0.43	£1.26	£0.27	£1.64	£0.00	£3.60
Fleet	£0.87	£0.00	£0.00	£0.00	£7.96	£8.83
Frimley	£0.00	£0.00	£0.81	£0.27	£0.38	£1.47
Godalming	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Guildford	£0.00	£0.75	£2.44	£1.36	£0.00	£4.56
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£0.87	£0.25	£0.00	£0.00	£2.28	£3.40
Sandhurst	£0.43	£0.00	£0.00	£0.00	£0.38	£0.81
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Crowthorne, Berkshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Farnborough Gate Retail Park	£0.00	£1.00	£1.90	£1.64	£0.00	£4.54
High Wycombe, Buckinghamshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.00	£0.00	£0.00	£0.00	£0.38	£0.38
Slough, Berkshire	£0.00	£0.00	£0.27	£0.00	£0.00	£0.27
Total	**£31.73**	**£21.61**	**£21.14**	**£20.19**	**£25.41**	**£120.08**

Source: Tables 3b and 8b

Table 9c Furniture, Soft Furnishings or Floor Coverings

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£23.70**	**£16.14**	**£15.79**	**£15.09**	**£18.98**	**£89.70**
Aldershot	£1.35	£4.64	£2.07	£2.92	£0.00	£10.99
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.34	£0.22	£0.26	£0.00	£0.92	£1.74
Bracknell	£0.00	£0.00	£0.00	£0.24	£0.61	£0.86
Camberley	£0.68	£1.11	£0.52	£0.49	£1.53	£4.32
Farnborough	£16.59	£5.97	£5.69	£6.33	£5.20	£39.79
Farnham	£0.00	£1.55	£1.04	£0.24	£0.92	£3.74
Fleet	£0.34	£0.22	£0.00	£0.24	£6.12	£6.93
Frimley	£0.00	£0.22	£0.00	£0.00	£0.31	£0.53
Godalming	£0.00	£0.00	£0.00	£0.24	£0.00	£0.24
Guildford	£0.34	£1.77	£3.11	£2.43	£0.31	£7.95
London	£0.34	£0.00	£0.00	£0.24	£0.00	£0.58
Reading	£0.68	£0.22	£0.52	£0.49	£2.14	£4.05
Sandhurst	£1.02	£0.00	£0.00	£0.00	£0.00	£1.02
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.34	£0.00	£0.78	£0.00	£0.00	£1.12
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.34	£0.22	£1.55	£0.24	£0.00	£2.36
Bagshot, Surrey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Birmignham, West Midlands	£0.34	£0.00	£0.00	£0.00	£0.00	£0.34
Bognor Regis, West Sussex	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cambridge	£0.00	£0.00	£0.00	£0.24	£0.00	£0.24
Croydon, Surrey	£0.00	£0.00	£0.00	£0.24	£0.00	£0.24
Darlington, County Durham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Door to Dorr Salesman	£0.00	£0.00	£0.00	£0.00	£0.31	£0.31
Farnborough Gate Retail Park	£0.00	£0.00	£0.26	£0.00	£0.00	£0.26
Hartley Wintney, Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
High Wycombe, Buckinghamshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.34	£0.00	£0.00	£0.24	£0.31	£0.89
Southampton, Hampshire	£0.00	£0.00	£0.00	£0.24	£0.31	£0.55
Wembley, Middlesex	£0.68	£0.00	£0.00	£0.00	£0.00	£0.68
Yateley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Total	**£23.70**	**£16.14**	**£15.79**	**£15.09**	**£18.98**	**£89.70**

Source: Tables 3b and 8c

Table 9d DIY / hardware or Garden Items

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£20.07**	**£13.67**	**£13.37**	**£12.77**	**£16.07**	**£75.95**
Aldershot	£0.22	£2.94	£0.75	£3.53	£0.36	£7.81
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.15	£0.00	£0.00	£0.15
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£0.00	£0.00	£0.15	£0.00	£1.08	£1.23
Farnborough	£18.29	£8.67	£11.12	£5.84	£11.56	£55.47
Farnham	£0.45	£1.47	£0.30	£2.99	£0.18	£5.39
Fleet	£0.45	£0.00	£0.00	£0.00	£2.89	£3.34
Frimley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Godalming	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22
Guildford	£0.00	£0.29	£0.60	£0.27	£0.00	£1.17
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sandhurst	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£0.15	£0.00	£0.00	£0.15
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.00	£0.15	£0.00	£0.00	£0.00	£0.15
Bagshot, Surrey	£0.22	£0.00	£0.00	£0.14	£0.00	£0.36
Blackwater, Camberley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Farnborough Gate Retail Park	£0.00	£0.00	£0.15	£0.00	£0.00	£0.15
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
North Town, Aldershot	£0.00	£0.15	£0.00	£0.00	£0.00	£0.15
Total	**£20.07**	**£13.67**	**£13.37**	**£12.77**	**£16.07**	**£75.95**

Source: Tables 3b and 8d

Table 9e Other Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£71.11**	**£48.42**	**£47.37**	**£45.26**	**£56.94**	**£269.09**
Aldershot	£2.34	£35.35	£19.16	£36.01	£2.40	£95.26
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£8.60	£0.48	£5.32	£0.00	£0.60	£15.00
Farnborough	£55.48	£2.91	£11.18	£1.46	£1.80	£72.82
Farnham	£0.78	£6.29	£0.53	£6.33	£1.20	£15.13
Fleet	£2.34	£0.00	£0.53	£0.00	£48.55	£51.43
Frimley	£0.00	£0.00	£2.13	£0.00	£0.00	£2.13
Godalming	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Guildford	£0.00	£2.42	£3.19	£1.46	£0.00	£7.07
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sandhurst	£1.56	£0.48	£0.53	£0.00	£0.00	£2.58
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£3.19	£0.00	£0.00	£3.19
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.00	£0.00	£1.06	£0.00	£0.00	£1.06
Blackwater, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£2.40	£2.40
Dorking, Surrey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hartley Wintney, Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.00	£0.48	£0.00	£0.00	£0.00	£0.48
Pirbright, Woking, Surrey	£0.00	£0.00	£0.53	£0.00	£0.00	£0.53
Yateley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Total	**£71.11**	**£48.42**	**£47.37**	**£45.26**	**£56.94**	**£269.09**

Source: Tables 3b and 8e

Notes: Other Goods' include: Chemist Goods
Jewellery/Watches/Clocks
Non-durable Household Goods
Bicycles
Recreational Goods
Other Miscellaneous Goods

2008 Prices

Table 10 Comparison Goods Turnover 2017 (£m)

Table 10a Clothes and Shoes

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£55.81**	**£40.31**	**£38.04**	**£36.34**	**£45.72**	**£216.21**
Aldershot	£1.4	£11.3	£4.3	£8.7	£0.0	£25.67
Alton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Basingstoke	£10.3	£3.9	£0.9	£1.5	£15.4	£32.03
Bracknell	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Camberley	£13.8	£6.5	£8.6	£6.4	£8.5	£43.87
Farnborough	£15.8	£1.7	£4.8	£1.5	£2.1	£25.98
Farnham	£1.4	£1.3	£0.9	£1.9	£2.7	£8.09
Fleet	£0.0	£0.0	£0.4	£0.0	£6.4	£6.81
Frimley	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Godalming	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Guildford	£6.9	£10.4	£13.8	£11.4	£3.2	£45.67
London	£0.0	£0.4	£0.0	£0.4	£0.5	£1.34
Reading	£1.4	£1.3	£0.4	£1.5	£4.3	£8.88
Sandhurst	£3.4	£0.0	£1.3	£0.8	£0.5	£6.03
Windsor	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Woking	£0.7	£0.4	£2.6	£2.3	£0.0	£5.99
Wokingham	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Abroad	£0.7	£0.0	£0.0	£0.0	£0.5	£1.22
Bath Avon	£0.0	£0.0	£0.0	£0.0	£0.5	£0.53
Bristol Avon	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Chichester, West Sussex	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Deal, Kent	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Fosbury, Malborough, Wiltshire	£0.0	£0.0	£0.0	£0.0	£0.5	£0.53
Kingston upon Thames, Surrey	£0.0	£0.4	£0.0	£0.0	£0.5	£0.97
Portsmouth, Hampshire	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Slough, Berkshire	£0.0	£0.0	£0.0	£0.0	£0.0	£0.00
Southampton, Hampshire	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Sutton, Surrey	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Swindon, Wiltshire	£0.0	£0.4	£0.0	£0.0	£0.0	£0.43
Total	**£55.81**	**£40.31**	**£38.04**	**£36.34**	**£45.72**	**£216.21**

Source: Tables 3b and 8a

Table 10b Domestic Electric Appliances

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£39.76**	**£28.72**	**£27.10**	**£25.89**	**£32.57**	**£154.04**
Aldershot	£0.00	£3.01	£0.69	£2.45	£0.49	£6.64
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.49	£0.49
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£2.18	£0.33	£1.74	£0.35	£0.49	£5.09
Farnborough	£34.32	£21.04	£17.37	£16.79	£16.53	£106.05
Farnham	£0.54	£1.67	£0.35	£2.10	£0.00	£4.66
Fleet	£1.09	£0.00	£0.00	£0.00	£10.21	£11.30
Frimley	£0.00	£0.00	£1.04	£0.35	£0.49	£1.88
Godalming	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Guildford	£0.00	£1.00	£3.13	£1.75	£0.00	£5.88
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£1.09	£0.33	£0.00	£0.00	£2.92	£4.34
Sandhurst	£0.54	£0.00	£0.00	£0.00	£0.49	£1.03
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Crowthorne, Berkshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Farnborough Gate Retail Park	£0.00	£1.34	£2.43	£2.10	£0.00	£5.87
High Wycombe, Buckinghamshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.00	£0.00	£0.00	£0.00	£0.49	£0.49
Slough, Berkshire	£0.00	£0.00	£0.35	£0.00	£0.00	£0.35
Total	**£39.76**	**£28.72**	**£27.10**	**£25.89**	**£32.57**	**£154.04**

Source: Tables 3b and 8b

Table 10c Furniture, Soft Furnishings or Floor Coverings

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£29.70**	**£21.45**	**£20.24**	**£19.34**	**£24.33**	**£115.07**
Aldershot	£1.70	£6.17	£2.65	£3.74	£0.00	£14.27
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.42	£0.29	£0.33	£0.00	£1.18	£2.23
Bracknell	£0.00	£0.00	£0.00	£0.31	£0.78	£1.10
Camberley	£0.85	£1.47	£0.66	£0.62	£1.96	£5.57
Farnborough	£20.79	£7.93	£7.30	£8.11	£6.67	£50.81
Farnham	£0.00	£2.06	£1.33	£0.31	£1.18	£4.87
Fleet	£0.42	£0.29	£0.00	£0.31	£7.85	£8.88
Frimley	£0.00	£0.29	£0.00	£0.00	£0.39	£0.69
Godalming	£0.00	£0.00	£0.00	£0.31	£0.00	£0.31
Guildford	£0.42	£2.35	£3.98	£3.12	£0.39	£10.27
London	£0.42	£0.00	£0.00	£0.31	£0.00	£0.74
Reading	£0.85	£0.29	£0.66	£0.62	£2.75	£5.18
Sandhurst	£1.27	£0.00	£0.00	£0.00	£0.00	£1.27
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.42	£0.00	£1.00	£0.00	£0.00	£1.42
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.42	£0.29	£1.99	£0.31	£0.00	£3.02
Bagshot, Surrey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Birmignham, West Midlands	£0.42	£0.00	£0.00	£0.00	£0.00	£0.42
Bognor Regis, West Sussex	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cambridge	£0.00	£0.00	£0.00	£0.31	£0.00	£0.31
Croydon, Surrey	£0.00	£0.00	£0.00	£0.31	£0.00	£0.31
Darlington, County Durham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Door to Dorr Salesman	£0.00	£0.00	£0.00	£0.00	£0.39	£0.39
Farnborough Gate Retail Park	£0.00	£0.00	£0.33	£0.00	£0.00	£0.33
Hartley Wintney, Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
High Wycombe, Buckinghamshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.42	£0.00	£0.00	£0.31	£0.39	£1.13
Southampton, Hampshire	£0.00	£0.00	£0.00	£0.31	£0.39	£0.70
Wembley, Middlesex	£0.85	£0.00	£0.00	£0.00	£0.00	£0.85
Yateley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Total	**£29.70**	**£21.45**	**£20.24**	**£19.34**	**£24.33**	**£115.07**

Source: Tables 3b and 8c

Table 10d DIY / hardware or Garden Items

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£25.15**	**£18.16**	**£17.14**	**£16.38**	**£20.60**	**£97.44**
Aldershot	£0.28	£3.91	£0.96	£4.53	£0.46	£10.14
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.19	£0.00	£0.00	£0.19
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£0.00	£0.00	£0.19	£0.00	£1.39	£1.58
Farnborough	£22.92	£11.52	£14.25	£7.49	£14.82	£71.00
Farnham	£0.56	£1.95	£0.39	£3.83	£0.23	£6.96
Fleet	£0.56	£0.00	£0.00	£0.00	£3.70	£4.26
Frimley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Godalming	£0.28	£0.00	£0.00	£0.00	£0.00	£0.28
Guildford	£0.00	£0.39	£0.77	£0.35	£0.00	£1.51
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sandhurst	£0.28	£0.00	£0.00	£0.00	£0.00	£0.28
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£0.19	£0.00	£0.00	£0.19
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.00	£0.20	£0.00	£0.00	£0.00	£0.20
Bagshot, Surrey	£0.28	£0.00	£0.00	£0.17	£0.00	£0.45
Blackwater, Camberley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Farnborough Gate Retail Park	£0.00	£0.00	£0.19	£0.00	£0.00	£0.19
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
North Town, Aldershot	£0.00	£0.20	£0.00	£0.00	£0.00	£0.20
Total	**£25.15**	**£18.16**	**£17.14**	**£16.38**	**£20.60**	**£97.44**

Source: Tables 3b and 8d

Table 10e Other Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Expenditure	**£89.11**	**£64.35**	**£60.73**	**£58.02**	**£73.00**	**£345.20**
Aldershot	£2.94	£46.98	£24.56	£46.16	£3.07	£123.71
Alton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basingstoke	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Bracknell	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Camberley	£10.77	£0.64	£6.82	£0.00	£0.77	£19.01
Farnborough	£69.52	£3.86	£14.33	£1.87	£2.31	£91.89
Farnham	£0.98	£8.37	£0.68	£8.11	£1.54	£19.67
Fleet	£2.94	£0.00	£0.68	£0.00	£62.24	£65.86
Frimley	£0.00	£0.00	£2.73	£0.00	£0.00	£2.73
Godalming	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Guildford	£0.00	£3.22	£4.09	£1.87	£0.00	£9.18
London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Reading	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Sandhurst	£1.96	£0.64	£0.68	£0.00	£0.00	£3.28
Windsor	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Woking	£0.00	£0.00	£4.09	£0.00	£0.00	£4.09
Wokingham	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Ash Vale, Aldershot	£0.00	£0.00	£1.36	£0.00	£0.00	£1.36
Blackwater, Camberley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Church Crookham, Fleet	£0.00	£0.00	£0.00	£0.00	£3.07	£3.07
Dorking, Surrey	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hartley Wintney, Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hook, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kingston upon Thames, Surrey	£0.00	£0.64	£0.00	£0.00	£0.00	£0.64
Pirbright, Woking, Surrey	£0.00	£0.00	£0.68	£0.00	£0.00	£0.68
Yateley, Hampshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Total	**£89.11**	**£64.35**	**£60.73**	**£58.02**	**£73.00**	**£345.20**

Source: Tables 3b and 8e

Notes: Other Goods' include: Chemist Goods
Jewellery/Watches/Clocks
Non-durable Household Goods
Bicycles
Recreational Goods
Other Miscellaneous Goods

2008 Prices

Table 11 - Estimated Turnover of Proposed Development

Total Floorspace		**sq m**	**Ratio**	
	Gross	3,145		
	Net	2,202		
Convenience Floorspace				
	Gross	1,585		
	Net	1,110	70%	
Comparison Floorspace				
	Gross	1,560		
	Net	1,092	70%	
Estimated Turnover				
		sqm	**Sales per sq m**	**£m**
	Convenience Goods	1,110	£10,000	11.10
	Comparison Goods	1,092	£4,640	5.07
	Total			**16.16**

Source: Convenience goods - Sales Density advised by and agreed by RBC retail consultants (NLP)
Comparison goods - Sales Density adopted by DPP as a 'generic town centre comparison floorspace density' (agreed by NLP)
Gross:Net floorspace ratio - advised by and agreed by RBC retail consultants (NLP)

2008 Prices

Table 12 - Convenience Goods Turnover with Development 2017

	Total Turnover from the Study Area (£m)	Total Turnover (£m)	Trade Draw to Proposed Development (%)	Trade Draw (£m)	Resultant Turnover with Development (£m)	Benchmark Turnover (£m)	Performance Against Company Average (%)
Asda, Princes Mead Shopping Centre, Farnborough	£42.71	£42.71	15%	£1.66	£41.05	£37.71	109%
Sainsburys, Kingsmead Centre, Farnborough	£13.08	£13.08	5%	£0.55	£12.52	£24.03	52%
Iceland, Queensmead, Farnborough	£0.62	£0.62		£0.00	£0.62	£2.04	30%
Morrisons, Summit Avenue, Southwood, Farnborough	£27.70	£27.70	8%	£0.89	£26.81	£19.51	137%
Co-op Welcome, Woburn Avenue, Farnborough	£3.54	£3.54		£0.00	£3.54		
Londis, Fernhill Road, Farnborough	£0.00	£0.00		£0.00	£0.00		
Londis, Medway Drive, Farnborough	£0.00	£0.00		£0.00	£0.00		
Budgens Express, Farnborough Raod, Farnborough	£0.00	£0.00		£0.00	£0.00		
Co-op Welcome, Fernhill Road, Cove, Farnborough	£2.12	£2.12		£0.00	£2.12		
One Stop, Cove Road, Farnborough	£0.35	£0.35		£0.00	£0.35		
Co-op Victoria Road, Aldershot	£4.59	£4.59	3%	£0.33	£4.26	£4.60	93%
M and S, Union Street, Aldershot	£7.31	£7.31	3%	£0.33	£6.98	£6.49	107%
Iceland, Victoria Road, Aldershot	£3.81	£3.81	2%	£0.22	£3.59	£2.15	167%
Spar, High Street, Aldershot	£1.07	£1.07	2%	£0.17	£0.91		
Lidl, Wellington Centre, Aldershot	£0.00	£0.00		£0.00	£0.00	£2.27	0%
Tesco, Wellington Avenue, Aldershot	£106.45	£106.45	22%	£2.44	£104.01	£40.64	256%
Bookers Cash & Carry, Aldershot	£0.00	£0.00		£0.00	£0.00		
Co-op, North Lane, Aldershot	£0.79	£0.79	1%	£0.11	£0.68		
Co-op Welcome, Queens Road, North Camp, Farnborough	£4.20	£4.20	2%	£0.17	£4.03	£1.25	322%
Co-op, Queens Road, Aldershot	£0.00	£0.00		£0.00	£0.00		
Co-op, Ash Street, Ash, Aldershot	£4.79	£4.79	1%	£0.11	£4.68		
One Stop, Lower Farm Road, Aldershot	£1.03	£1.03		£0.00	£1.03		
Budgens, Wharf Road, Ash Vale, Aldershot	£9.35	£9.35	5%	£0.55	£8.80		
Sainsburys, Water Lane, Farnham	£39.63	£39.63		£0.00	£39.63		
Sainsburys Farnham Town Centre	£0.59	£0.59		£0.00	£0.59		
Iceland, The Woolmead, East Street, Farnham	£0.26	£0.26		£0.00	£0.26		
Lidl, Dogflud Way, Farnham	£1.98	£1.98		£0.00	£1.98		
Londis, The Street, Tongham, Farnham	£0.62	£0.62		£0.00	£0.62		
Tesco Express, Ridgeway Road, Farnham	£0.00	£0.00		£0.00	£0.00		
Tesco Express, Upper Hale Road, Farnham	£0.53	£0.53		£0.00	£0.53		
Waitrose, The Hart, Farnham	£2.53	£2.53		£0.00	£2.53		
Aldi, London Road, Blackwater Camberley	£0.91	£0.91		£0.00	£0.91		
Co-op, Upper College Ride, Camberley	£0.00	£0.00		£0.00	£0.00		
Lidl, The Atrium, Charles Street, Camberley	£0.00	£0.00		£0.00	£0.00		
One Stop, The Green, Frimley Green, Camberley	£0.28	£0.28		£0.00	£0.28		
Sainsburys, Blackwater, Valley Road, Watchmoor Park, Camberley	£25.60	£25.60		£0.00	£25.60		
Sainsburys, Cambridge Walk, Camberley	£0.87	£0.87		£0.00	£0.87		
Sainsburys, Heather Ridge Arcade, Camberley	£1.15	£1.15		£0.00	£1.15		
Tesco Express, Balmoral Drive, Frimley, Camberley	£2.83	£2.83		£0.00	£2.83		
Waitrose, High Street, Frimley, Camberley	£4.12	£4.12		£0.00	£4.12		
Iceland, Fleet Road, Fleet	£0.35	£0.35		£0.00	£0.35		
M and S Simply Food, Fleet	£1.32	£1.32	1%	£0.11	£1.21		
Morrisons, Elvetham Heath, Fleet	£20.16	£20.16	10%	£1.11	£19.05		
Sainsburys, Fleet Road, Fleet	£11.97	£11.97	8%	£0.89	£11.09		
Londis, Northfield Road, Church Crookham, Fleet	£0.30	£0.30		£0.00	£0.30		
Spar, Linkway Parade, Fleet	£1.21	£1.21		£0.00	£1.21		
Tesco Express, Falkner Close, Ancells Farm, Fleet	£3.84	£3.84	1%	£0.11	£3.73		
Tesco Express, Reading Road South, Church Crookham, Fleet	£2.83	£2.83	2%	£0.22	£2.61		
Waitrose, The Hart Centre, Fleet	£27.97	£27.97	10%	£1.11	£26.86		
Asda, Lower Earley District Centre, Reading	£0.00	£0.00		£0.00	£0.00		
Costco, South Oak Way, Reading	£0.59	£0.59		£0.00	£0.59		
Tesco, Napier Road, Reading	£0.00	£0.00		£0.00	£0.00		
Co-op, High Street, Knaphill	£0.28	£0.28		£0.00	£0.28		
Morrisons, Goldsworth Road, Woking	£0.00	£0.00		£0.00	£0.00		
Sainsburys, Redding Way, Knaphill, Woking	£2.34	£2.34		£0.00	£2.34		
Spar, High Street, Horsell, Woking	£0.00	£0.00		£0.00	£0.00		
Waitrose, The Goldsworth Park Centre, Woking	£0.28	£0.28		£0.00	£0.28		
M and S, High Street, Guildford	£0.00	£0.00		£0.00	£0.00		
Sainsburys, Clay Lane, Burpham, Guildford	£0.59	£0.59		£0.00	£0.59		
Sainsburys, High Street, Guildford	£0.00	£0.00		£0.00	£0.00		
Tesco, Ashenden Road, Guildford	£0.56	£0.56		£0.00	£0.56		
Costcutters, Elizabeth Parade, Tudor Drive, Yateley	£0.00	£0.00		£0.00	£0.00		
Waitrose, Tresham Crescent, Yateley	£0.00	£0.00		£0.00	£0.00		
Co-op, Tresham Cresent, Yateley	£0.00	£0.00		£0.00	£0.00		
Co-op, Reading Road, Yateley	£0.00	£0.00		£0.00	£0.00		
Tesco, The Meadows, Marshall Road, College Town, Sandhurst	£9.91	£9.91		£0.00	£9.91		
M and S, The Meadows, Marshall Road, College Town, Sandhurst	£2.37	£2.37		£0.00	£2.37		
Lidl, London Road, Blackwater, Camberley	£1.17	£1.17		£0.00	£1.17		
Morrisons, Churchill Way West, Basingstoke	£0.00	£0.00		£0.00	£0.00		
Sainsburys Local, Station Mall, Basingstoke	£0.00	£0.00		£0.00	£0.00		
Tesco, Chineham Shopping Centre, Basingstoke	£0.00	£0.00		£0.00	£0.00		
Sainsburys , Emerson Way, Emersons Green, Bristol	£0.00	£0.00		£0.00	£0.00		
Tesco Express, Salisbury Street, Fordingbridge	£0.00	£0.00		£0.00	£0.00		
Tesco, Caledonian Road, Kings Cross, London	£0.00	£0.00		£0.00	£0.00		
Tesco, Station Road, Hook	£0.00	£0.00		£0.00	£0.00		
Tesco, Station Raod, Addlestone	£0.59	£0.59		£0.00	£0.59		
Budgens, Guildford Road, Lightwater	£0.00	£0.00		£0.00	£0.00		
Sainsburys, Bridge Way, Cobham	£0.26	£0.26		£0.00	£0.26		
Local Shops	£23.23	£23.23		£0.00	£23.23		
Total	**£427.52**	**£427.52**	**100%**	**£11.10**	**£416.42**	**£140.69**	

Table 13 - Convenience Goods Impact 2017 with Proposed Development & Commitments

	Total Turnover 2012 (£m)	Total Turnover 2017 (£m)	Growth in Turnover 2012 - 2017 (£m)	Trade Draw to Commitments (£m)	Impact of Commitments excl. Growth (%)	Total Turnover after Commitments (£m)	Trade Draw to Proposed Development (%)	Trade Draw to Proposed Development (£m)	Impact of Proposed Development excl. Growth (%)	Cumulative Trade Draw to Proposed Development & Commitments (£m)	Total Turnover after Commitments & Proposed Development (£m)	Cumulative Impact of Proposed Development & Commitments excl. Growth (%)	Performance Against Company Average (%)
Asda, Princes Mead Shopping Centre, Farnborough	£40.82	£42.71	£1.89	£4.40	-6.2%	£38.31	10.0%	£1.11	1.9%	£5.51	£37.20	-8.9%	99%
Sainsburys, Kingsmead Centre, Farnborough	£12.55	£13.08	£0.53	£1.04	-4.1%	£12.04	5.0%	£0.55	-0.2%	£1.60	£11.48	-8.5%	48%
Iceland, Queensmead, Farnborough	£0.56	£0.62	£0.05	£0.00	9.7%	£0.62		£0.00	9.7%	£0.00	£0.62	9.7%	30%
Morrisons, Summit Avenue, Southwood, Farnborough	£26.65	£27.70	£1.05	£1.12	-0.3%	£26.57	8.0%	£0.89	0.6%	£2.01	£25.68	-3.6%	132%
Co-op Welcome, Woburn Avenue, Farnborough	£3.42	£3.54	£0.12	£0.00	3.4%	£3.54		£0.00	3.4%	£0.00	£3.54	3.4%	
Co-op Welcome, Fernhill Road, Cove, Farnborough	£2.05	£2.12	£0.07	£0.00	3.4%	£2.12		£0.00	3.4%	£0.00	£2.12	3.4%	
One Stop, Cove Road, Farnborough	£0.34	£0.35	£0.01	£0.00	3.4%	£0.35		£0.00	3.4%	£0.00	£0.35	3.4%	
IQ Farnborough, Templer Avenue, Farnborough (Commitment)						*£8.84*	*2.5%*	*£0.28*	*-3.1%*	*£0.28*	*£8.56*	*-3.1%*	
Co-op Victoria Road, Aldershot	£4.28	£4.59	£0.32	£0.09	5.4%	£4.51	3.0%	£0.33	-0.4%	£0.42	£4.17	-2.4%	91%
M and S, Union Street, Aldershot	£6.87	£7.31	£0.44	£0.17	3.9%	£7.14	3.0%	£0.33	1.5%	£0.50	£6.81	-0.9%	105%
Iceland, Victoria Road, Aldershot	£3.59	£3.81	£0.22	£0.04	5.2%	£3.78	2.0%	£0.22	0.1%	£0.26	£3.55	-1.0%	165%
Spar, High Street, Aldershot	£1.01	£1.07	£0.06	£0.00	5.7%	£1.07	0.5%	£0.06	0.4%	£0.06	£1.02	0.3%	
Tesco, Wellington Avenue, Aldershot	£99.50	£106.45	£6.94	£39.25	-32.5%	£67.19	15.0%	£1.66	5.3%	£40.92	£65.53	-34.1%	161%
Co-op, North Lane, Aldershot	£0.75	£0.79	£0.04	£0.00	5.7%	£0.79	1.0%	£0.11	-9.0%	£0.11	£0.68	-9.1%	
Class A1 Retail Unit, 150 Ash Road, Aldershot (Commitment)						*£2.68*	*0.5%*	*£0.06*	*-2.1%*	*£0.06*	*£2.62*	*-2.1%*	
Morrisons, Westgate Site, Wellington Avenue (Commitment)						*£39.17*	*10.0%*	*£1.11*	*-2.8%*	*£1.11*	*£38.06*	*-2.8%*	*94%*
Co-op Welcome, Queens Road, North Camp, Farnborough	£3.97	£4.20	£0.23	£0.00	5.7%	£4.20	1.5%	£0.17	1.5%	£0.17	£4.03	1.5%	10%
Co-op, Ash Street, Ash, Aldershot	£4.42	£4.79	£0.37	£0.00	8.4%	£4.79	1.0%	£0.11	5.9%	£0.11	£4.68	5.9%	
One Stop, Lower Farm Road, Aldershot	£0.94	£1.03	£0.09	£0.00	9.7%	£1.03		£0.00	9.7%	£0.00	£1.03	9.7%	
Budgens, Wharf Road, Ash Vale, Aldershot	£8.79	£9.35	£0.56	£0.00	6.4%	£9.35	5.0%	£0.55	0.1%	£0.55	£8.80	0.1%	
Sainsburys, Water Lane, Farnham	£36.91	£39.63	£2.72	£1.19	4.1%	£38.44		£0.00	7.4%	£1.19	£38.44	4.1%	
Sainsburys Farnham Town Centre	£0.56	£0.59	£0.03	£0.00	5.8%	£0.59		£0.00	5.8%	£0.00	£0.59	5.8%	
Iceland, The Woolmead, East Street, Farnham	£0.25	£0.26	£0.01	£0.00	5.8%	£0.26		£0.00	5.8%	£0.00	£0.26	5.8%	
Lidl, Dogflud Way, Farnham	£1.85	£1.98	£0.13	£0.00	7.0%	£1.98		£0.00	7.0%	£0.00	£1.98	7.0%	
Londis, The Street, Tongham, Farnham	£0.56	£0.62	£0.05	£0.00	9.7%	£0.62		£0.00	9.7%	£0.00	£0.62	9.7%	
Tesco Express, Upper Hale Road, Farnham	£0.50	£0.53	£0.03	£0.00	5.8%	£0.53		£0.00	5.8%	£0.00	£0.53	5.8%	
Waitrose, The Hart, Farnham	£2.38	£2.53	£0.15	£0.00	6.2%	£2.53		£0.00	6.2%	£0.00	£2.53	6.2%	
Aldi, London Road, Blackwater Camberley	£0.88	£0.91	£0.03	£0.00	3.4%	£0.91		£0.00	3.4%	£0.00	£0.91	3.4%	
One Stop, The Green, Frimley Green, Camberley	£0.27	£0.28	£0.02	£0.00	5.8%	£0.28		£0.00	5.8%	£0.00	£0.28	5.8%	
Sainsburys, Blackwater, Valley Road, Watchmoor Park, Camberley	£24.42	£25.60	£1.18	£1.02	0.6%	£24.57		£0.00	4.8%	£1.02	£24.57	0.6%	
Sainsburys, Cambridge Walk, Camberley	£0.82	£0.87	£0.05	£0.00	5.8%	£0.87		£0.00	5.8%	£0.00	£0.87	5.8%	
Sainsburys, Heather Ridge Arcade, Camberley	£1.09	£1.15	£0.06	£0.00	5.8%	£1.15		£0.00	5.8%	£0.00	£1.15	5.8%	
Tesco Express, Balmoral Drive, Frimley, Camberley	£2.68	£2.83	£0.16	£0.00	5.8%	£2.83		£0.00	5.8%	£0.00	£2.83	5.8%	
Waitrose, High Street, Frimley, Camberley	£3.93	£4.12	£0.19	£0.00	4.8%	£4.12		£0.00	4.8%	£0.00	£4.12	4.8%	
Iceland, Fleet Road, Fleet	£0.34	£0.35	£0.01	£0.00	3.4%	£0.35		£0.00	3.4%	£0.00	£0.35	3.4%	
M and S Simply Food, Fleet	£1.25	£1.32	£0.07	£0.00	5.8%	£1.32	1.0%	£0.11	-3.0%	£0.11	£1.21	-3.0%	
Morrisons, Elvetham Heath, Fleet	£19.02	£20.16	£1.14	£0.46	3.6%	£19.69	10.0%	£1.11	0.2%	£1.57	£18.59	-2.3%	
Sainsburys, Fleet Road, Fleet	£11.33	£11.97	£0.64	£0.00	5.6%	£11.97	8.0%	£0.89	-2.2%	£0.89	£11.09	-2.2%	
Londis, Northfield Road, Church Crookham, Fleet	£0.28	£0.30	£0.02	£0.00	5.8%	£0.30		£0.00	5.8%	£0.00	£0.30	5.8%	
Spar, Linkway Parade, Fleet	£1.14	£1.21	£0.07	£0.00	5.8%	£1.21		£0.00	5.8%	£0.00	£1.21	5.8%	
Tesco Express, Falkner Close, Ancells Farm, Fleet	£3.64	£3.84	£0.20	£0.00	5.4%	£3.84	1.0%	£0.11	2.3%	£0.11	£3.73	2.3%	
Tesco Express, Reading Road South, Church Crookham, Fleet	£2.67	£2.83	£0.16	£0.00	5.8%	£2.83	2.0%	£0.22	-2.5%	£0.22	£2.61	-2.5%	
Waitrose, The Hart Centre, Fleet	£26.45	£27.97	£1.52	£0.64	3.3%	£27.33	10.0%	£1.11	1.6%	£1.75	£26.22	-0.9%	
Costco, South Oak Way, Reading	£0.56	£0.59	£0.03	£0.00	5.8%	£0.59		£0.00	5.8%	£0.00	£0.59	5.8%	
Co-op, High Street, Knaphill	£0.27	£0.28	£0.02	£0.00	5.8%	£0.28		£0.00	5.8%	£0.00	£0.28	5.8%	
Sainsburys, Redding Way, Knaphill, Woking	£2.22	£2.34	£0.13	£0.00	5.8%	£2.34		£0.00	5.8%	£0.00	£2.34	5.8%	
Waitrose, The Goldsworth Park Centre, Woking	£0.27	£0.28	£0.02	£0.00	5.8%	£0.28		£0.00	5.8%	£0.00	£0.28	5.8%	
Sainsburys, Clay Lane, Burpham, Guildford	£0.56	£0.59	£0.03	£0.00	5.8%	£0.59		£0.00	5.8%	£0.00	£0.59	5.8%	
Tesco, Ashenden Road, Guildford	£0.53	£0.56	£0.03	£0.00	5.8%	£0.56		£0.00	5.8%	£0.00	£0.56	5.8%	
Tesco, The Meadows, Marshall Road, College Town, Sandhurst	£9.51	£9.91	£0.39	£0.00	4.1%	£9.91		£0.00	4.1%	£0.00	£9.91	4.1%	
M and S, The Meadows, Marshall Road, College Town, Sandhurst	£2.28	£2.37	£0.09	£0.00	4.0%	£2.37		£0.00	4.0%	£0.00	£2.37	4.0%	
Lidl, London Road, Blackwater, Camberley	£1.11	£1.17	£0.05	£0.00	4.8%	£1.17		£0.00	4.8%	£0.00	£1.17	4.8%	
Tesco, Station Raod, Addlestone	£0.56	£0.59	£0.03	£0.00	5.8%	£0.59		£0.00	5.8%	£0.00	£0.59	5.8%	
Sainsburys, Bridge Way, Cobham	£0.24	£0.26	£0.02	£0.00	9.7%	£0.26		£0.00	9.7%	£0.00	£0.26	9.7%	
											£0.00		
Local Shops	£21.88	£23.23	£1.35	£1.25	0.4%	£21.98		£0.00	6.2%	£1.25	£21.98	0.4%	
Total	**£403.71**	**£427.52**	**£23.81**	**£50.68**		**£427.52**	**100.0%**	**£11.10**		**£61.78**	**£416.42**		

Table 14 - Comparison Goods Turnover with Development 2017

	Total Turnover from the Study Area (£m)	Total Turnover (£m)	Trade Draw to Proposed Development (%)	Trade Draw (£m)	Resultant Turnover with Development (£m)
Aldershot	£180.43	£180.43	30%	£1.52	£178.91
Alton	£0.00	£0.00		£0.00	£0.00
Basingstoke	£34.94	£34.94		£0.00	£34.94
Bracknell	£1.10	£1.10		£0.00	£1.10
Camberley	£75.11	£75.11		£0.00	£75.11
Farnborough	£345.72	£345.72	40%	£2.03	£343.69
Farnham	£44.26	£44.26		£0.00	£44.26
Fleet	£97.11	£97.11	20%	£1.01	£96.10
Frimley	£5.29	£5.29		£0.00	£5.29
Godalming	£0.59	£0.59		£0.00	£0.59
Guildford	£72.51	£72.51		£0.00	£72.51
London	£2.08	£2.08		£0.00	£2.08
Reading	£18.40	£18.40		£0.00	£18.40
Sandhurst	£11.90	£11.90		£0.00	£11.90
Windsor	£0.00	£0.00		£0.00	£0.00
Woking	£11.69	£11.69		£0.00	£11.69
Wokingham	£0.00	£0.00		£0.00	£0.00
Other	£26.83	£26.83	10%	£0.51	£26.32
Total	**£927.95**	**£927.95**	**100%**	**£5.07**	**£922.89**

Table 15 - Comparison Goods Impact 2017 with Proposed Development & Commitments

	Total Turnover 2012 (£m)	Total Turnover 2017 (£m)	Growth in Turnover 2012 - 2017 (£m)	Trade Draw to Commitments (£m)	Impact of Commitments excl. Growth (%)	Total Turnover after Commitments (£m)	Trade Draw to Proposed Development (%)	Trade Draw to Proposed Development (£m)	Impact of Proposed Development excl. Growth (%)	Cumulative Trade Draw to Proposed Development & Commitments (£m)	Total Turnover after Commitments & Proposed Development (£m)	Cumulative Impact of Proposed Development & Commitments excl. Growth (%)
Aldershot	*£138.89*	*£180.43*	*£41.54*	*£5.71*	*25.8%*	*£182.81*	*30.0%*	*£1.52*	*28.8%*	*£7.23*	*£173.20*	*24.7%*
Basingstoke	£27.33	£34.94	£7.61	£0.00	27.8%	£34.94		£0.00	27.8%	£0.00	£34.94	27.8%
Bracknell	£0.86	£1.10	£0.24	£0.00	28.2%	£1.10		£0.00	28.2%	£0.00	£1.10	28.2%
Camberley	£58.84	£75.11	£16.27	£0.80	26.3%	£74.31		£0.00	27.7%	£0.80	£74.31	26.3%
Farnborough	*£271.34*	*£345.72*	*£74.38*	*£19.54*	*20.2%*	*£345.18*	*40.0%*	*£2.03*	*26.7%*	*£21.57*	*£324.15*	*19.5%*
Farnham	£34.17	£44.26	£10.10	£0.18	29.0%	£44.09		£0.00	29.6%	£0.18	£44.09	29.0%
Fleet	£75.83	£97.11	£21.28	£0.44	27.5%	£96.68	20.0%	£1.01	26.7%	£1.45	£95.66	26.1%
Frimley	£4.12	£5.29	£1.17	£0.00	28.5%	£5.29		£0.00	28.5%	£0.00	£5.29	28.5%
Godalming	£0.47	£0.59	£0.13	£0.00	26.8%	£0.59		£0.00	26.8%	£0.00	£0.59	26.8%
Guildford	£56.21	£72.51	£16.30	£0.00	29.0%	£72.51		£0.00	29.0%	£0.00	£72.51	29.0%
London	£1.62	£2.08	£0.46	£0.00	28.5%	£2.08		£0.00	28.5%	£0.00	£2.08	28.5%
Reading	£14.36	£18.40	£4.04	£0.00	28.1%	£18.40		£0.00	28.1%	£0.00	£18.40	28.1%
Sandhurst	£9.40	£11.90	£2.50	£0.00	26.6%	£11.90		£0.00	26.6%	£0.00	£11.90	26.6%
Woking	£9.13	£11.69	£2.56	£0.00	28.1%	£11.69		£0.00	28.1%	£0.00	£11.69	28.1%
Other	£20.82	£26.83	£6.00	£0.43	26.8%	£26.40	10.0%	£0.51	26.4%	£0.93	£25.89	24.3%
Total	**£723.36**	**£927.95**	**£204.59**	**£27.10**		**£927.95**	**100.0%**	**£5.07**		**£32.16**	**£895.79**	

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