

**Portsmouth Shopping Study
Update**

on Behalf of

Portsmouth City Council

Volume 1:

**Main Report and
Appendices**

December 2004

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1. INTRODUCTION

Terms of Reference

- 1.1 On 10th March 2004, Portsmouth City Council instructed Colliers CRE to update the Portsmouth Shopping Study, which we prepared for the Council in July 1998. The purpose of the update is to assist the Council in determining retail planning policy within the District. In particular, the Council require an objective assessment of the quantitative need for additional retail floorspace in Portsmouth through to 2016.
- 1.2 The main objectives of the study are as follows:-
- To undertake an assessment of the quantitative need for additional shopping floorspace within Portsmouth District through to 2016, to include:-
 - Separate assessments for non-bulky and bulky comparison goods and convenience goods;
 - Definition and analysis of the catchment areas for the main goods categories;
 - An assessment of expenditure capacity; and
 - An analysis of current and future trading patterns.
 - In carrying out the new assessment, to take into account the changes (and clarification) to Government policy on retail 'need' since 1998 (the date of our last Shopping Study); for example, the McNulty Statement of April 2003 and the draft PPS 6 published in December 2003.
- 1.3 It was agreed in discussions with officers of Portsmouth City Council that the main emphasis of the study should be on assessing the quantitative need for new retail development within Portsmouth District as a whole, with disaggregated totals for Portsmouth City Centre, Southsea Town Centre and the suburban centres of Cosham, Fratton, Northend/London Road, as well as Gunwharf Quays. Furthermore, also by way of clarification, this study is designed to assist the Council in planning for the future shopping needs of the residents of Portsmouth and its immediate hinterland. The study is not specific to any individual proposed retail development and any future application for major retailing in Portsmouth should, if required by the Council, be supported by a more specific need and retail impact assessment relating directly to the application scheme. Such assessments should be made by

intending developers or retailers with the Council having the option of commissioning expert critical appraisals of such assessments as part of the development process.

Background to the Study

1.4 Colliers CRE prepared a Shopping Study on Portsmouth which was published in July 1998. The main objectives of this study were to quantify the need for additional retail floorspace at the forecast years of 2001, 2006 and 2016 and to advise on how this additional retail floorspace should be distributed throughout the District. The result of the study informed the retail policies set out in the Portsmouth City Local Plan, First Review, 2001-2011.

1.5 A public inquiry into objections to the Local Plan was held between 11th March and 25th July 2003. The planning inspectorate reported on the inquiry on 18th December 2003. In relation to retail and town centre development, the Inspector noted that the Colliers CRE study was already five years old at the time of the inquiry, with important elements of the survey work dating back even further to 1996. Accordingly, the Inspector concluded as follows:

- *“It is regrettable that no update of the study was available to the Inquiry. In the absence of one, I have concluded that there is no sound basis of need assessment to underpin the Plan’s retail strategy, or on which I can base any recommendations that different amounts of retail provision would be required”.¹*

1.6 The Inspector went on to state that:

- *“As I do not have any robust assessment of retail need over the Plan period available to me, I cannot make recommendations that would bring the Plan into line with Government advice that need should be assessed first, and then sites allocated following a sequential approach to site selection”.²*

1.7 The Inspector’s conclusion was that retail floorspace totals giving the scope for additional retail floorspace should be deleted from the plan because they are out of date and that need should be determined on a case by case basis.

¹ Public Local Inquiry into Objections to the Portsmouth City Local Plan, First Review’ 2001-2011, Inspectors Report, 18th December, 2003, Paragraph 1.8.10.

² Paragraph 1.8.12.

- 1.8 Following the Inspector's report at the inquiry, the Council instructed Colliers CRE to update its 1998 Shopping Study. This report updates the quantitative need assessment, and includes refinements to the need methodology and new sources of data. Significantly, the assessment is underpinned by a new household telephone survey carried out during April/May 2004.
- 1.9 Since the 1998 study was published, the retail economy of the sub-region has continued to evolve. Major new retail developments within Portsmouth include the Gunwharf Quays Designer Outlet, which opened in 2001, and the new B & Q warehouse at the Pompey Trade Centre. At long last the redundant Tricorn Centre in the city centre is being demolished and an application is expected later this year for a new comprehensive retail scheme on the site. Retail development has also characterised competitor centres with the most significant addition being the 74,000 sq m gross West Quay scheme in Southampton City Centre. This scheme has considerably enhanced Southampton's retail attractiveness to consumers and improved the city's position in the shopping hierarchy.

Study Approach

- 1.10 In carrying out this study we have had regard to Government advice in Planning Policy Guidance Note 6 (PPG 6) and the draft Planning Policy Statement 6 (PPS 6), and Structure and Local Plan framework policies. In addition, we have drawn on our wider experience of retailing and experience gained in undertaking retail need / capacity studies in many other parts of the country. Specifically, we have sought to combine experience in terms of:
- Research
 - Planning
 - Market Knowledge

As such the study seeks to blend detailed **research** with relevant **commercial expertise** provided by the company's research and consultancy and retail agency departments.

- 1.11 The research element has been an important feature of this study. A **telephone survey** of 1,500 households living within Portsmouth and its shopping hinterland has been carried out. We use the results of the household survey to help quantify shopping trip patterns and flows of retail expenditure between residential areas (where people live) and retail centres (where

people spend). This assessment of shopper behaviour helps underpin our analysis of quantitative retail floorspace need.

- 1.12 We gratefully acknowledge the assistance of all organisations and individuals who have assisted in the preparation of this study. Whilst we have had full regard to the views expressed, this report reflects our own conclusions.

Structure of the Report

- 1.13 Our report is in two volumes. **Volume 1** (this volume) comprises the Consultants Report and Technical Appendices and specifically addresses our Terms of Reference. **Volume 2** contains the detailed spreadsheets which form our quantitative retail need (capacity) assessment. The two volumes should be read together.
- 1.14 In terms of this volume, **Section 2** describes the key retail, economic and property market trends at the national level, and draws on recently published data as well as the results of our own in-house research. The purpose of this review is to provide a retail context for the rest of the study.
- 1.15 In **Section 3**, we consider the retail hierarchy of the sub-region and describe the role being performed by Portsmouth City Centre, town and suburban centres. We also define and map the catchment areas of Portsmouth City Centre for non-bulky and bulky comparison goods and convenience goods shopping.
- 1.16 In **Section 4**, we consider the qualitative need for new retail development within Portsmouth. The report first describes the background to qualitative need and then in broad terms examines such need through a brief overview of each of the main retail centres within Portsmouth District and a consideration of the shopping provision available in nearby competitor centres within the sub-region. Our conclusions on qualitative need feed through into our assessment of quantitative need.
- 1.17 In **Section 5**, we outline the sources of data which we use in the quantitative retail need assessment and describe our main assumptions and definitions.

- 1.18 In **Section 6**, we look to the future and quantify the retail expenditure capacity available to support additional convenience and comparison goods retail floorspace within Portsmouth. This quantitative need assessment is carried out for forecast years 2008, 2011 and 2016.
- 1.19 In the light of our assessments of quantitative need (Sections 5 and 6) and qualitative need (Section 4), in **Section 7** we present our conclusions and recommendations to the Council in respect of the need for additional retail floorspace provision within Portsmouth through to 2016.

2. RETAILING – TRENDS AND NATIONAL CONTEXT

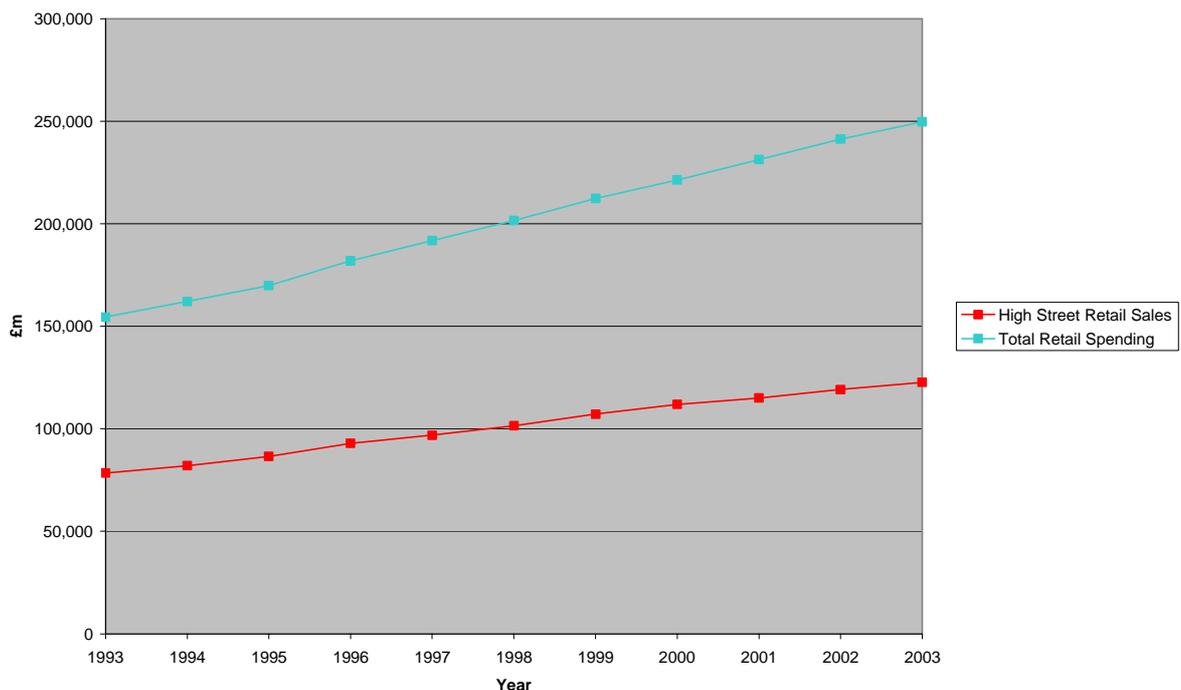
Introduction

2.1 Although the main emphasis of this study is on preparing a quantitative retail floorspace need assessment for Portsmouth District, it is useful to set local shopper behaviour, retailer intentions and town centre performance within the context of national retail and consumer trends. Retailing is a dynamic industry and the way it evolves will have important implications for all parts of the UK, including the Portsmouth area.

Retailing - Periods of Rapid Change

2.2 During the 1980s and 1990s the UK retailing industry underwent a radical transformation. Fired by a growing volume of consumer spending, a considerable economic boom occurred. **Figure 2.1** illustrates the growth in consumer retail expenditure since 1993. Between 1993 and 2003, for example, retail spend rose by around £100,000 million. This rapid increase was due to the easy availability of credit, a booming house market and increasing consumer confidence which translated into consumer expenditure. Many of these trends continue to the present day.

Figure 2.1 Annual Retail Sales, 1993-2003 – At Current Prices

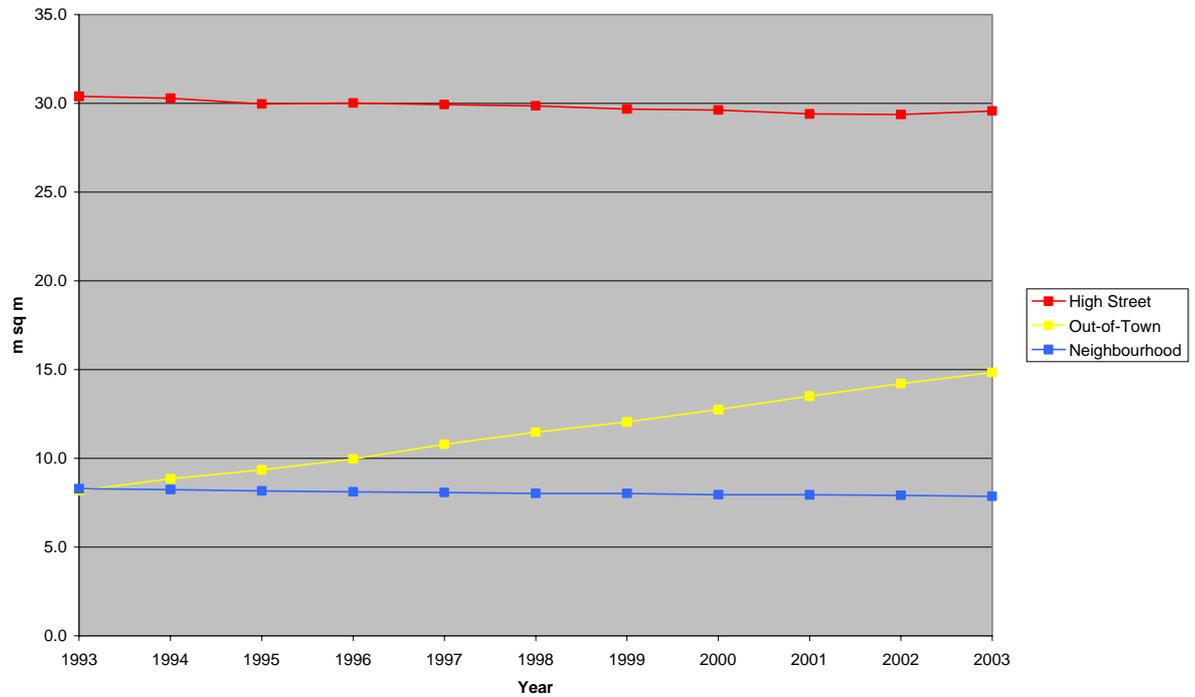


Source: Verdict

- 2.3 The general buoyancy and demand was correspondingly underpinned by important changes on the supply side, notably:-
- The advance of superstores and multiple retailers;
 - Achievement of larger economies of scale;
 - Introduction of attractive new store designs and systems of product presentation;
 - Superior systems of stock control and replacement.
- 2.4 A new generation of consumers was courted by new retailers focusing heavily on design and market segmentation (e.g. Next, Tie Rack, The Body Shop). The aggressive expansion of new retailers added further pressures to a widespread demand for a limited resource, i.e. prime sites on the high street and in shopping centres. However, this was confined almost entirely to large towns and cities, rather than smaller centres.
- 2.5 The 1980s also saw a period of financial deregulation. High Street sites were in competition and eagerly acquired by such service providers as banks, building societies and estate agencies.
- 2.6 All these market changes put upward pressures on the level of shop rents as a consequence of the “race for space”. Between 1984 and 1988 rents nationally increased by over 60%. This large increase was vastly in excess of the underlying growth in retail sales and consumer expenditure (25% and 23% respectively). As retailer demand continued to fuel rental growth, new shopping developments in town centres and out of centre became viable. This took the form of both major centre schemes, retail parks and smaller “courtyard” developments, sometimes in secondary locations in the larger centres.
- 2.7 Between 1987 and 1996 the quantity of out of centre floorspace in the UK grew by over 87% (an increase of around 4.9 million sq m), whereas the equivalent figure for in-town retail floorspace showed a growth of only 0.7% (less than 0.2 million sq m). Thus, in floorspace terms virtually the whole of the net additional growth in the UK retail sector between 1987 and 1996 was out of centre. During this time migration of the main out of centre sectors from the high street created space into which the more traditional high street retail sectors expanded. By the end of 2000 out of centre shopping accounted for 25% of total retail space and 32% of retail sales, with forecasters predicting increases in these proportions to 27% and 36% respectively by 2005. **Figures 2.2 to 2.4** overleaf summarise changes in the quantum of

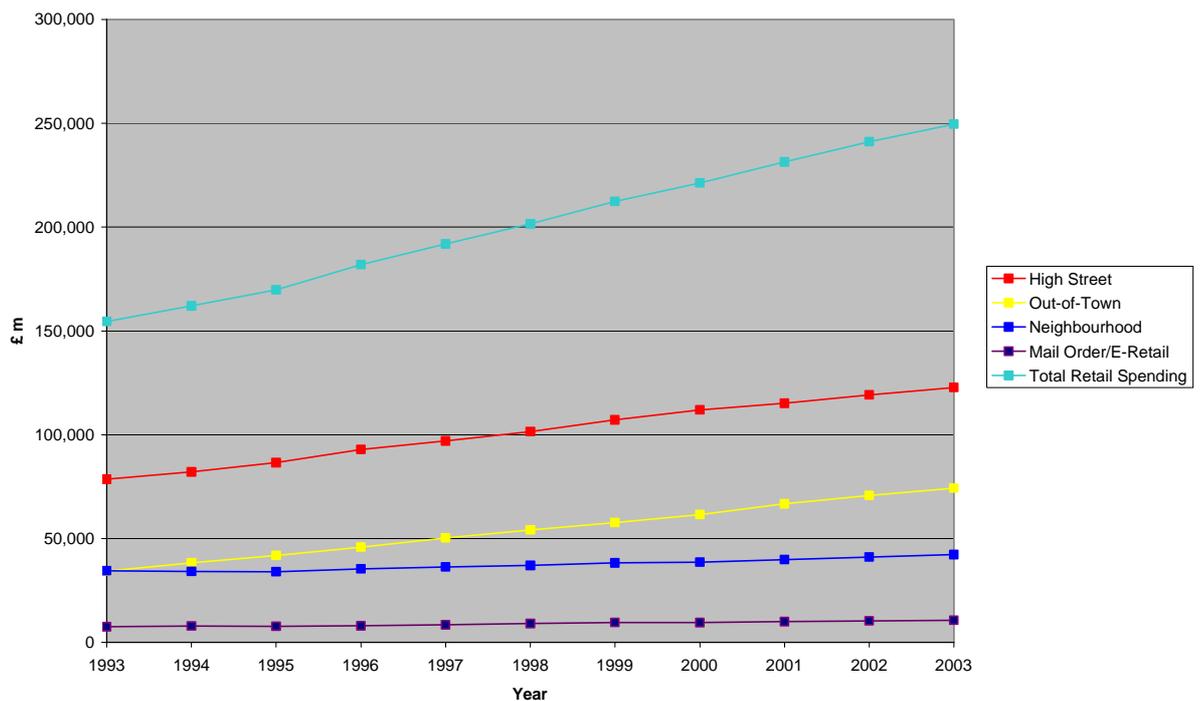
retail sales and retail floorspace by physical location over the past decade and the relationship between the two indicators (sales densities).

Figure 2.2 Retail Floorspace by Location 1993-2003



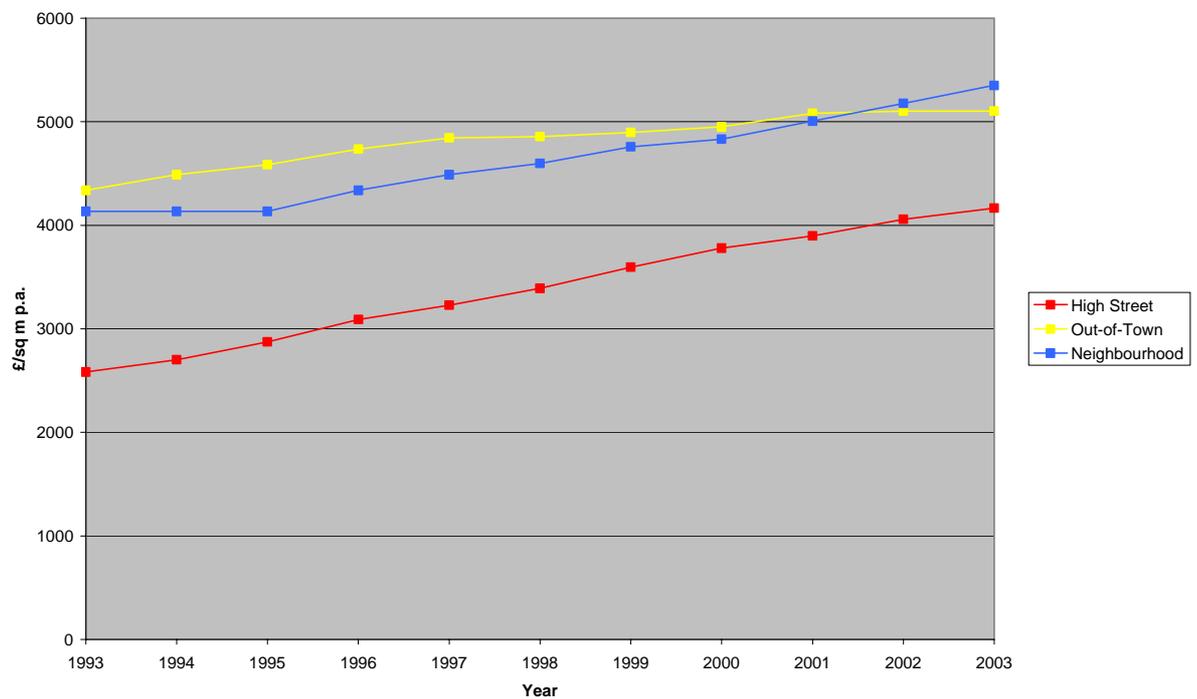
Source: Verdict

Figure 2.3 Retail Sales by Location at Current Prices 1993-2003



Source: Verdict

Figure 2.4 Sales Densities by Location at Current Prices, 1993-2003



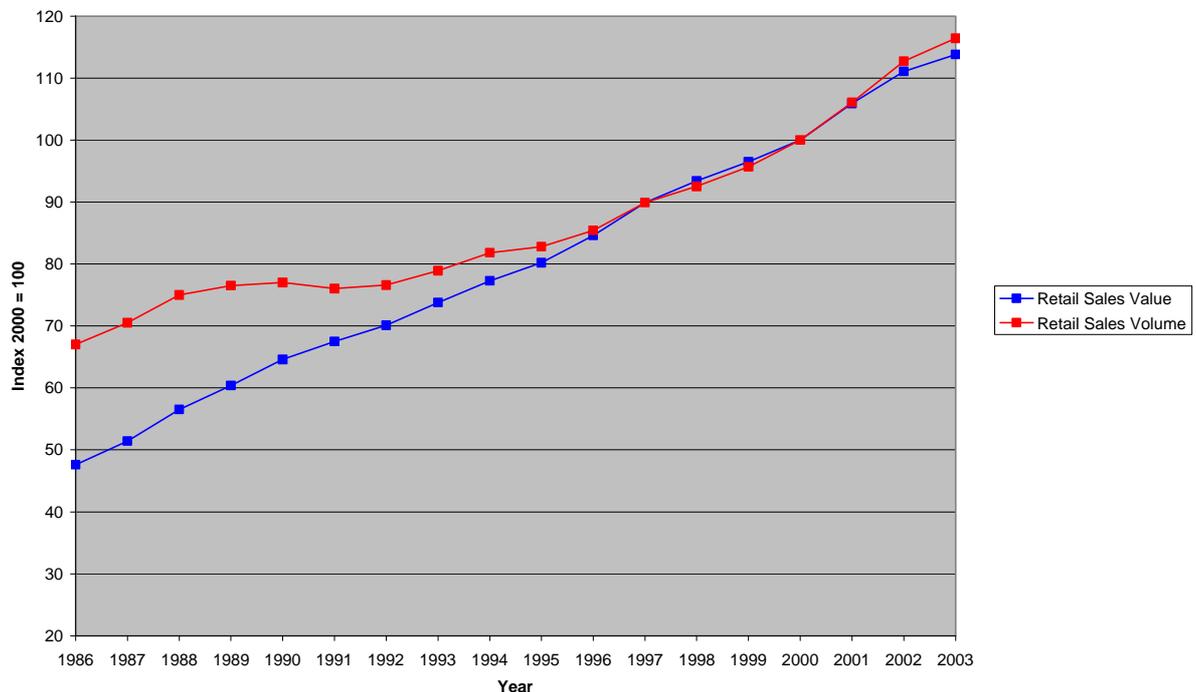
Source: Verdict

- 2.8 In relation to high street retail the 1980s and 1990s saw an increasing concentration of shopping provision within the UK's largest city and town centres. By 2000, for example, the top 100 locations accounted for an estimated 36% of (town centre) floorspace and 58% of sales.

Recession and Retailing

- 2.9 The results of the onset of the recession at the end of the 1980s are well documented - a virtual standstill in retail sales and a sharp decline in the fortunes of high street stores. From 1989 to the end of 1992, the general trend in retail sales at constant prices (ie. discounting for inflation) was static (see **Figure 2.5** overleaf) in marked contrast to the expectations on which some retailers' business plans were based.

Figure 2.5 Retail Sales Values vs Volumes, 1986 - 2003



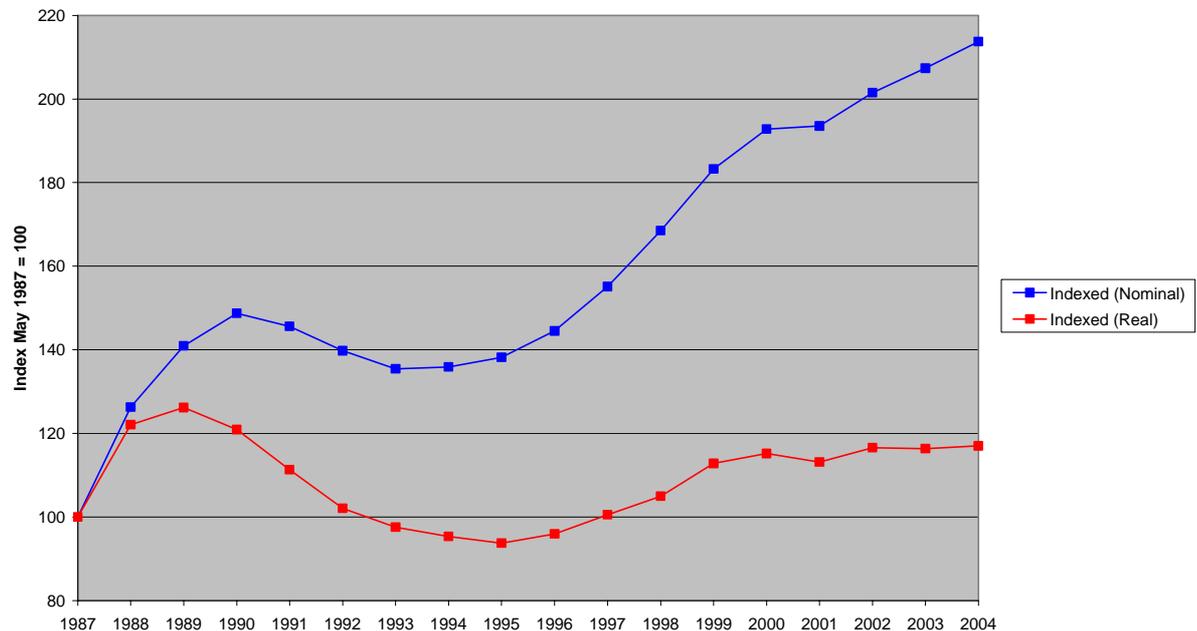
Source: ONS

2.10 High rents and low sales resulted in many retailers (multiples and independents) having a particularly difficult time. Some retailers closed down or down-sized their holdings considerably. This period also saw the growth of the “discounters” (food and non-food) as consumers became very cost conscious. In addition, charity shops proliferated as landlords tried to recoup lost income from voids arising from the downturn. This period was characterised as being very much a tenants market as tenants had substantial negotiating clout resulting from the downturn.

Improving Fortunes and Further Evolution

2.11 Since 1996, growing consumer confidence leading to increasing retail spend has once again encouraged retailers to expand with strong competition for prime sites and a resultant increase in prime rents (see **Figure 2.6** overleaf). Although prime rents have now been rising each year since 1993-94, in real terms (i.e. after taking inflation into account) values still remain lower than those achieved more than a decade ago. In absolute terms, the average UK prime rent rose from £538 per sq m (£50 per sq. ft) in 1987 to £807 per sq m (£75 per sq. ft) in 1990 before falling back to £732 per sq m (£68 per sq. ft) in 1993. Since then, the average rent has increased annually to reach £1163 per sq m (£108 per sq ft) in May 2004.

Figure 2.6 Average UK Prime Rent, 1987-2004



Source: Colliers CRE In-Town Retail Rents Database

- 2.12 The general confidence in retail markets since 1996 has been the result of a buoyant national economy, resulting in increasing consumer affluence and confidence. Positive economic indicators included a growth in Gross Domestic Product (GDP), relatively low inflation and falling unemployment. This confidence in the economy has seen improvement in rents across all property sectors. Property also witnessed a significant increase in investment from institutional investors.
- 2.13 Over the past few years the principal demand for space in the high street has come from retailers trading in the mobile phone and coffee shop sectors, which resulted in strong demand for small units. However, more recently there has also been a re-emergence of demand from all sectors of the retail market, including A2 uses (e.g. banks, building societies and betting offices). In turn this has resulted in more balanced rental growth across all unit sizes, although prime, well-configured units are particularly in demand.
- 2.14 Retailers are responding to the emerging consumer needs by focusing more on the establishment of larger shops that are able to provide the full range of their products at a competitive price. According to Verdict, high street stores are now 25% larger than a decade ago as retailers such as Marks & Spencer and Next strive to expand floorspace to accommodate broader ranges and services. Typically, these new “mega” shops are located in the larger “quality” regional centres where catchment populations are considerable and

affluent, and where retailers can maximise market share through a more focused branch network.

- 2.15 Retailing is also becoming more and more about branding and specialisation. The retail generalists, such as W H Smith and Boots, are finding it ever harder to maintain market share, especially as the supermarkets move more into non-foods. The buying power of these operators now enables them to undercut most high street retailers on price.
- 2.16 There is also a growing element of convergence between retailing and leisure. Both retailing and leisure have a developing synergy so that the shopping trip is now increasingly seen as a “day out” rather than a regular routine or chore. An example of this trend is the shopping trip which in itself is undertaken as a leisure activity. This is particularly well illustrated by the new breed of factory outlet centres which have opened throughout the UK, where research which we have undertaken shows that up to 75% of visits are essentially leisure based trips and are “net additional” to regular visits made to the high street.
- 2.17 There has been growing pressure and competition from café, snack bar, restaurant and licensed retail operators (e.g. JD Wetherspoon), responding to the trend of people choosing to eat out more regularly and contributing to the concept of the evening economy. This has inevitably put pressure on rents in prime and secondary locations.
- 2.18 In key centres, international retailers are also very active. The best example of this is central London, where locations such Oxford Street, Bond Street and Regent Street have attracted an influx of major names including Armani, Donna Karan, Louis Vuitton and Gianni Versace. However, demand from overseas retailers is also strong in a number of the other major regional centres such as Manchester, Glasgow and Leeds.

Current Planning Policy

- 2.19 Retailers and developers have largely adjusted to Government planning guidance on retailing and town centres. This gives pre-eminence to town centres and locations accessible by a variety of means of transport and are fundamental elements of the Government’s sustainable development strategy. Guidance in many ways seek to determine behaviour, rather than manage and/or control market forces. The requirement to demonstrate “need” and the “sequential approach” to new retail development are both having major implications for out of centre retailing and the expanding leisure industry.

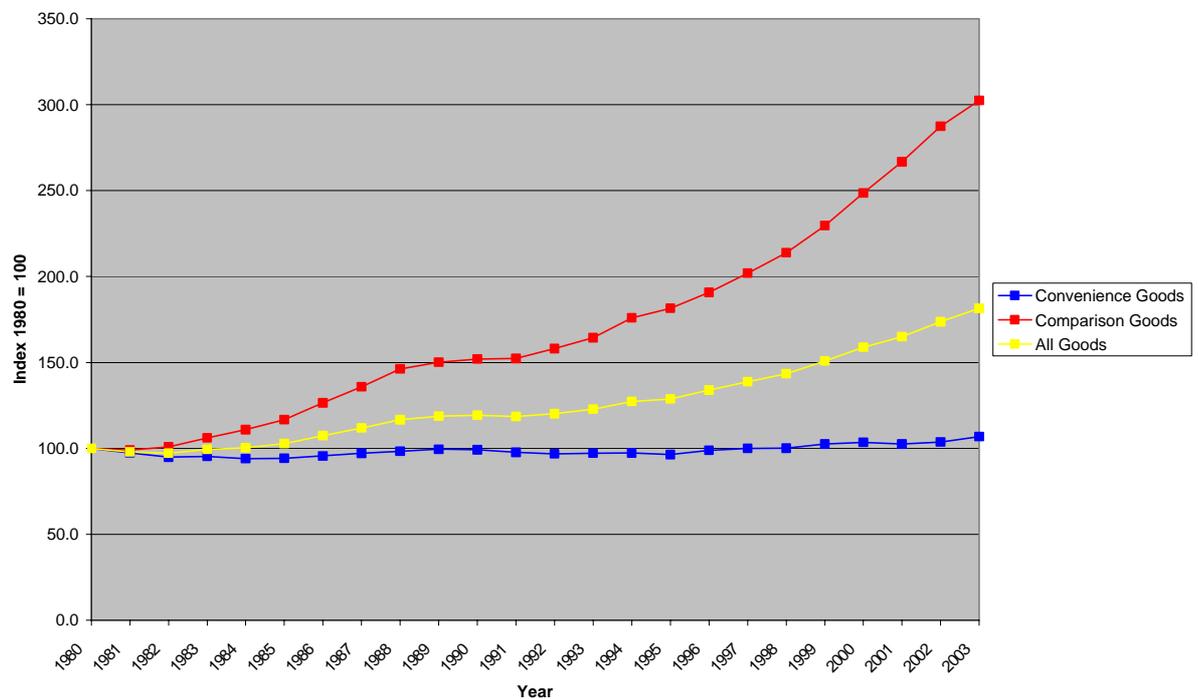
2.20 The government is currently seeking ways to further clarify / simplify planning policy and the planning process, and (in England) a new Draft Planning Policy Statement 6: Planning for Town Centres has been published and was recently circulated for consultation.

Out of Town Retailing and Leisure

Food

2.21 Food retailers continued to expand through the recession of the early 1990s, particularly in out of centre locations. The slow growth in convenience goods expenditure (illustrated in **Figure 2.7**) contributed to the expansion plans of food retailers by forcing them to fight for market share and to benefit further from economies of scale. The logic appears to be that to increase market share and profits, there is a need to increase floorspace.

Figure 2.7: Consumer Retail Expenditure per Head by Goods Type, Annual Average for the UK (Constant Prices) between 1980 and 2003



Source: MapInfo Information Brief 04/02 - April 2004

2.22 In the past, increasing floorspace was achieved mainly through new superstore development, especially out of centre. However, with government planning policy curtailing opportunities out of centre, the major operators are increasingly looking to extend their existing stores. Extensions are used to accommodate non-food ranges which have lower sales densities (than

food) but generate better margins. Larger stores also enable food store operators to diversify into services or to accommodate in-store service use concessions (e.g. coffee shops, dry cleaners, shoe repairers and photographic processing).

2.23 Smaller store formats have been devised by a number of major food store operators and this has also spearheaded the movement back to town centres. An example of one of the new formats is Tesco with its “Metro” and “Express” concepts. The promotion of town centre living, along with the growth in one person households as well as an increasingly ageing population, has created a market for in-town supermarkets.

2.24 The growth in the number of larger superstores (**Table 2.1**) has been at the expense of smaller supermarkets and other food specialists. The net effect of the expansion of the superstores has been a loss of almost 24,000 food shops over the past decade.

Table 2.1 Total Grocery Store Numbers by Retailer Type, 1993-2003

Year	Larger Superstores	Supermarkets and Smaller Grocers	Food Specialists	Other Stores	Total Stores
1993	934	38,592	46,665	67,432	153,623
1994	988	37,747	45,376	66,028	150,139
1995	1,027	36,314	43,107	64,080	144,528
1996	1,053	35,317	41,931	62,238	140,539
1997	1,084	34,438	41,493	61,886	138,901
1998	1,117	33,766	41,321	61,131	137,335
1999	1,150	33,586	40,891	60,392	136,019
2000	1,180	33,228	40,351	59,631	134,390
2001	1,235	33,040	39,699	58,949	132,923
2002	1,292	32,785	39,131	58,049	131,257
2003	1,319	32,523	38,480	57,433	129,755
% Change 1993-2003	41.2	-15.7	-17.5	-14.8	-15.5

Source: Verdict on Grocery Retailers, January 2004

Non-Food

2.25 Following many years of rapid growth, the out of town retail warehouse sector suffered a down-turn at the end of the 1980s. By the mid 1990s it had recovered and today it is one of the strongest of the retail sectors. This renaissance derives from a series of innovations

which, when combined, create the modern purpose-built retail park. Schemes built in the early 1980s are being examined critically and some are being redeveloped or extended. Free-standing (“solus”) units are rapidly becoming outmoded. Some units are reducing in size from that typically required by DIY operators to meet the new range of retail warehouse or “showroom” occupiers.

- 2.26 The retail warehouse market continues to segment as it matures. Prime rents are paid for space on purpose built retail parks which are accessible by a large catchment population and which benefit from an “open” (non food) retail planning consent (the first tier - “superprime”). In other locations, premiums are being paid by a wider range of retailers (typically for smaller retail warehouses) having such a planning consent (the second tier). With the increased use of planning conditions to restrict the use of out of town retail warehouses to “bulky goods”, a third tier has developed in investment terms.
- 2.27 A key issue relating to the out of town retail market is the Government’s intention (as set out in the recent Planning Bill) that all future mezzanines will require specific planning permission. This is likely to have important implications, since mezzanines have become vital to many out of centre retailers as a way of affording their rents. Consequently, the impact of this legislation (although it will not be retrospective) is that it will restrict the rents that out of town retailers will be able to afford, as they will need to recalibrate their rent models to paying rent on the whole of their unit. In turn this may impact on rental growth in units (and retail parks) whose mezzanines are not permitted.

Leisure

- 2.28 The concept of the out of town leisure park, anchored by a multiplex cinema and bringing together a range of leisure and restaurant uses, evolved rapidly during the 1990s. Like the retail sector, large sites of 4.0 ha (10 acres) or more have typically been sought with a catchment of about 250,000 people in a 20 minute drive time. However, new government planning policy is also beginning to have an impact on the leisure sector, particularly in relation to the sequential approach to site location.
- 2.29 More recently the leisure property sector has seen a period of consolidation and this trend is expected to continue, although the public appetite for the “leisure offer” continues to grow. Expansion in the cinema, bowling and bingo sectors will remain highly selective and is

beginning to encompass smaller market towns. The expansion of health and fitness clubs has recently bounced back after several years of modest activity.

- 2.30 In recent years a number of city centre based urban entertainment centres have opened (e.g. The Light, Leeds; and The Cornerhouse, Nottingham) in which leisure occupiers largely tap into urban dwellers, office workers and students. This is creating a polarisation effect with the established out of town leisure park which retains a more family orientated customer base.
- 2.31 The sector of the leisure market which is currently dominating the headlines is gaming. The prospect of the widespread deregulation is now likely in 2005 or 2006 following the publication in April, 2004 of the Joint Committee Report on the draft Gambling Bill. Deregulation is likely to lead to a raft of casino-led developments (many are already on drawing boards across the country) with planning and political issues playing a major part in determining the number, location and scale of such schemes.

The Future of Out of Centre Retailing and the Implications for Town Centres

- 2.32 The Government through a number of decisions and statements has confirmed its support for town centres and restricting/preventing out of town proposals.
- 2.33 In July 1997 the Government's Response to the Fourth Report from the House of Commons Select Committee on the Environment, "Shopping Centres", was published. This states that:
- "The Government is firmly committed to the objectives of PPG 6, which seeks to sustain and enhance the vitality and viability of our existing city, town and district centres, to make them the focus for investment, particularly in retail, office, leisure and other appropriate developments, so as to provide easy access to a wide range of facilities and services by a choice of means of transport. Such investment is essential to the regeneration and enhancement of the attractiveness of our town and city centres."* (Paragraph 1).
- 2.34 Although the period of rapid out-of-centre expansion witnessed during the 1980s and 1990s is at an end, out of centre retailing will continue to grow in terms of store numbers, selling space and total retail sales. The existing development pipeline, an increasing emphasis on store extensions and future consents to proposals that are deemed to meet the sequential approach will help fuel this continuing growth.

- 2.35 Developers in the current planning environment continue to cast around for new concepts and variations on the theme, as restrictions apply on conventional retail parks. Out of centre retailing has continued to adopt a leisure focus. For example, there are the now common “drive-thru” restaurants operated by the main fast food operators (McDonalds, Burger King, Kentucky Fried Chicken). These are conspicuously located at the front of retail parks and appear to raise their profile by attracting passing motorists. In addition, drive-thru's work well where there is leisure (cinema/bingo) in addition to retail.
- 2.36 Another important trend is the movement of a range of typical high street comparison goods retailers such as Next, River Island, Boots and W H Smith to out of centre retail locations such as Fosse Park, Leicester. However, the spread of these formats is currently limited by a lack of supply as a result of tougher Government planning guidance.

E-Shopping

- 2.37 In November 2002, monthly UK online sales passed the £1 billion mark for the first time, and following significant further growth have now reached around £2.5 billion. This represents 7% of all UK retail sales – up from 5% in 2002 and just 2% in 2001. Online sales have therefore risen rapidly to become an integral part of the British retail market, and are still growing.
- 2.38 According to a recent study by IBM and The Economist, the UK is now the biggest e-commerce market in Europe. More significantly, given the suggestion that Britain trails the US in terms of Internet use, the UK's Internet awareness is on a par with that of the States, while our online retail economy is now growing three times faster than in the US.
- 2.39 Consumer confidence in online retailers has risen as shoppers have tested out the Internet and found websites increasingly easy to navigate, credit card use to be secure and delivery to be convenient and reliable. The ease of comparing the price of goods and services has also led sales to soar.
- 2.40 It is important to note that not all of the growth in online sales impacts directly on spend available to the high street. Nevertheless, online sales are now beyond the point where growth is simply cannibalisation of more traditional home shopping formats. Prior to the explosion of the Internet, mail order was estimated to account for around 4.5% of UK retail sales. Although the problems facing traditional large-book mail order companies have been well documented, the more targeted direct mail order formats are still experiencing good

sales levels. Therefore not all of mail order's 4.5% market share has been lost to Internet shopping and, with the latter's share now around 7%, it is now beginning to capture some of the consumer spend attracted to bricks and mortar retailing.

2.41 This implies Internet retailers are pulling trade away from Britain's high streets. In practice, however, many of these operators run both traditional and online operations; for example, Argos and Tesco, the UK's third and fourth biggest E-commerce sites. Therefore this does not necessarily mean high street retailers are losing out. In the case of Tesco, electronic orders are fulfilled out of existing stores, so growing online sales may even increase the need for retail property.

2.42 The UK is now at a stage where the rapid expansion of online retailing, which has increased by 75% in the last 12 months alone, has led this sector of the market to eat into some of the growth in consumer retail expenditure. Looking to the long term future of the UK's high streets, the continuous level of growth that has always underpinned the retail property sector should no longer be taken for granted. Of particular concern is that the latest e-sales figures show that the fastest growing online shopping sector is clothing and footwear – the traditional main stay of most high streets - which now account for 9% of all UK Internet sales.

Retail Outlook

2.43 High Street retailing was in equilibrium in mid 2001, at which point the supply of shop units was in balance with the demand for them. Since then, however, despite the events of September 11th 2001, occupier demand has improved reflecting a robust economic climate and increased consumer affluence. This positive performance has fed through into prime rental growth of 3.1% between mid 2003 and mid 2004, up slightly on the 3.0% achieved during 2002/3.

2.44 The key characteristics of the in-town retail market are as follows:-

- Location, location, location is being replaced by size, configuration and value for money as retailers concentrate on profit instead of turnover;
- Retail demand is for all unit sizes although bigger is often better;

- Branding and specialisation is becoming increasingly important, resulting in ‘generalist’ retailers struggling to maintain their market share;
- While the number of shopping centre openings during the past couple of years has been relatively low the next cycle is underway and the development pipeline is now reaching a size not witnessed for over a decade;
- After many years in the doldrums, department stores are gaining in popularity with consumers as a result of the range and choice of products for sale under one roof and the quality of service on offer; the ageing customer base of the UK is also fuelling the growth of the sector and while major city centres are the principal locations, some operators such as Debenhams are considering small towns with populations of 75,000 for a mini-department store format.

2.45 The ‘exodus’ of high street retailers to out of town is a widely publicised theme. However, Colliers CRE research shows that only around 10% of out of town floorspace is in fact occupied by high street retailers, while Next and T K Maxx are the only traders showing any real commitment to the out of town market outside the relatively small number of fashion parks. In most cases seeking out of town representation to replace a high street store is rare and is more to do with the lack of suitable opportunities.

2.46 Obtaining planning consent for an out of centre retail development continues to be difficult. Increasingly landlords and operators in this sector are addressing the issue through extensions to existing retail parks and individual superstores or through the re-working of existing consents, for example by refurbishment and/or redevelopment. The supermarket operators in particular are also now devising new high street trading formats which are being rolled out from London and the South East to the regions.

2.47 One interesting development is the switch from out-of-town back in in-town, where retailers like PC World, Courts, Matalan and Allied Carpets have all expressed interest in expanding. This is a consequence of the ever-increasing cost and lack of availability of suitable out-of-town space, coupled with retailers’ desire to add an in-town dimension to their offer and capture an untapped market.

2.48 In the leisure sector, it is unlikely that future development will replicate the established leisure parks or urban entertainment centre formats. Instead selected leisure uses will be incorporated into mixed use schemes or shopping centre development and refurbishment

projects. These uses are likely to be focused on specific operator demand at the local level – a marked shift away from the ‘build it and they will come’ development philosophy of the late 1990s.

2.49 In the medium to longer term the retail property market is likely to be impacted by a number of important national trends, the most important of which are:-

- a rapidly ageing population – 2016 it is estimated that there will be 2.1 million fewer people aged under 40 but 3.5 million more people over 40 years of age;
- a declining share of consumer expenditure – although disposable incomes have risen every year for more than a decade, the proportion of expenditure which is spent on retailing goods has fallen from 38.9% in 1990 to 34.6% in 2000 and is expected to decline even further to just 31.6% by 2005;
- an increasing concentration of retail activity in the largest towns and cities – in the 1960s it took 200 retail locations to account for 50% of all UK non-food sales but today this same proportion of turnover is channelled through less than 80 retail centres and the number is forecast to decrease even more.

Summary

2.50 While the retail sector is currently buoyant, with prime rents having risen steadily since 1993, it has been subject to significant fluctuations when looked at over the medium term. A range of new retailers are again seeking large prime sites while the general trend both in and out of centre has been towards larger size units. It is for this reason that retail floorspace in the UK has risen over the past decade by around 4.5 million sq m, while shop numbers have fallen by more than 40,000 units over the same period. There is also the view that seeking to prevent out of centre retail development has been left too late. Nevertheless, the restrictions imposed by Government planning guidance are having an effect and opportunities in town centres are increasingly being sought, albeit that some will require the active assistance of the local authority. In addition to the issue of “in-town” versus “out-of-town”, the strengthening role of major retail centres often at the cost of smaller district and local centres needs to be taken into account.

2.51 Finally, general trends within the retail industry should not be ignored. Retailers are constantly monitoring changing trends in fashion and demographics so that consumer

demand is satisfied. Retailing is an evolving process with retailers constantly adapting to demand and increasingly analysing and targeting customers. These continual changes have important implications for property and retail location, which in turn are related to retail policy. Local authorities should therefore regularly monitor the dynamic retail sector in order to ensure that their policies are both up to date and appropriate.

3. SUB-REGIONAL SHOPPING PATTERNS

Introduction

- 3.1 In this section we consider the retail hierarchy of the sub-region and describe the present role and performance of Portsmouth as a destination for shopping. We also define the catchment areas of Portsmouth City Centre for convenience goods and non-bulky and bulky comparison goods shopping. This assessment involves quantifying the extent and pattern of expenditure retention and leakage from the city. We also examine the main characteristics of shopping trips and identify the dominant retail centres across the sub-region for the main types of shopping activity. Our assessment is based primarily on data on shopping behaviour drawn from our household survey of Portsmouth and its shopping hinterland.

Assessment of the Portsmouth Retail Economy

- 3.2 In order to provide actual empirical evidence on shopping patterns within the Portsmouth area, we commissioned a telephone survey of 1,500 resident households throughout Portsmouth and its shopping hinterland. This survey was carried out during April/May 2004. **Appendix 1** describes the survey methodology, summarises the main results and contains a copy of the questionnaire.
- 3.3 The main objective of the Portsmouth household survey was to obtain comprehensive information on consumer shopping trip patterns and expenditure flows for convenience goods (food) and non-bulky and bulky comparison goods (non-food) shopping within the sub-region.

Household Survey Methodology and Portsmouth Catchment Area Definition

- 3.4 Agreement on the survey methodology was reached with Portsmouth City Council prior to commencement of the fieldwork. It was agreed that the survey would concentrate on households living within 17 zones, each defined in terms of postal geography, as is usual.¹ The zones are identified in **Figure 3.1** overleaf. In total these 17 zones cover the whole of Portsea Island and the shopping hinterland for Portsmouth City Centre. The area covered by the household survey and the definition of individual zones has in part been influenced by

¹ **Appendix 1B** gives the postcode sector constituting each zone.

the survey underpinning our 1998 Shopping Study for the Council. We have tried to ensure as much consistency as possible in order that some comparisons of Portsmouth's retail performance and market share can be derived. The use of zones enables the analysis of flows of retail expenditure throughout the sub-region and permits the individual shopping catchments for different centres and broad categories of goods to be defined.

- 3.5 For the Portsmouth household survey, structured interviews were carried out, by telephone, with the person responsible for the main shop in a total of 1,500 households to ascertain their actual shopping patterns and their views. The aim was to achieve around 88 interviews in each zone, a number which exceeds the 70-80 that is normally accepted as being statistically significant. Adopting what is standard practice, we opted for a consistent absolute sample in each zone, rather than one proportional to zone population. This is because the latter approach would have meant a significantly larger number of interviews overall to ensure a minimum absolute number of interviews in the less densely populated zones. There was not the budget available to adopt this approach, nor was it considered essential.
- 3.6 By adopting a consistent number of interviews within the zones irrespective of the population size of each zone, we accordingly over-sample in some zones and under-sample in others, while maintaining the same overall sample size. At the analysis stage of the survey, the individual samples are then "weighted" to their appropriate representation within the survey population to produce an overall result which is representative of the survey area as a whole. Without the weighting, the less densely populated zones would have a disproportionately large effect on the overall survey results, contrary to their population size. The whole principle of weighting therefore allows the characteristics of less densely populated zones to be accurately represented without the unnecessary cost of a grossly inflated sample.
- 3.7 Within the survey area as a whole, we sought to determine the catchment area of Portsmouth using survey data on expenditure patterns. Our analysis permits the core, primary, secondary and tertiary catchments to be determined. For the purpose of this study we have adopted the following definitions:
- **core catchment:** comprising those zones from which a centre attracts **the majority** of generated expenditure (i.e. 51% or more);

- **primary catchment:** comprises those zones from which a centre attracts **the largest single flow** of generated expenditure (this may be less than 50%);
- **secondary catchment:** comprises those remaining zones from which a centre attracts **10% or more** of generated expenditure;
- **tertiary catchment:** comprises all remaining zones from which a centre attracts **2% or more** of generated expenditure.

3.8 Beyond the tertiary catchment, the full results show that certain centres may attract even smaller amounts of expenditure from additional zones. Such expenditure flows will typically account for very low proportions of overall centre turnover and can, for most analytical purposes, be ignored. We have therefore excluded these zones from our wider definition of a catchment area.

Sub-Regional Shopping Hierarchy

3.9 The geographical location of Portsmouth District within the wider sub-region is shown in **Figure 3.1** overleaf. In retailing terms, Portsmouth City Centre not only serves the residents of Portsea Island but also a much wider hinterland which stretches to Petersfield in the north, while to the west and east the city's retail influence is constrained by the competitor cities of Southampton and Chichester respectively. **Table 3.1** overleaf compares the current retail ranking of Portsmouth City Centre with other major centres in the sub-region.

Fig 3.1:

Map Showing Geographical Definition of Household Survey Zones



Table 3.1 Portsmouth and Nearby Competing Centres: Retail Rankings

(a) Centre by MHE UK Rank Position

Centre	1998/99	2000/01	2003/04
Southampton	26	28	15
Portsmouth	72	74	73
Chichester	97	84	109
Fareham	178	182	201
Waterlooville	395	438	276
Gosport	336	347	296
Petersfield	505	497	421
Havant	450	461	462

(b) Centre by MHE Shopping Centre Index Score

Centre	1998/99	2000/01	2003/04
Southampton	198	207	258
Portsmouth	138	144	159
Chichester	119	133	132
Fareham	81	88	95
Waterlooville	30	28	69
Gosport	37	39	65
Petersfield	20	22	46
Havant	24	26	42

Source: Management Horizons Europe (MHE), UK Shopping Centre Index 1998/99; 2000/01 and 2003/04

3.10 Portsmouth District itself contains a wide range of centres and retail facilities. The city centre is naturally the principal retail destination for shoppers, but the popular Gunwharf Quays designer outlet is also becoming an important draw, particularly for visitors and tourists. There are also a number of town and suburban centres – Southsea, Fratton, North End/London Road and Cosham – and a range of out of centre retail parks and superstores. The relative retail ranking of the different centres in Portsmouth District is illustrated in **Table 3.2**.

Table 3.2 Retail Locations within Portsmouth District: Retail Rankings

(a) Centre by MHE UK Rank Position

Centre	1998/99	2000/01	2003/04
Portsmouth City Centre	72	74	73
Southsea	300	321	404
Cosham	516	572	421
Gunwharf Quays	-	-	565
North End/London Road	486	550	685
Fratton	n/a	n/a	n/a

(b) Centre by MHE Shopping Centre Index Score

Centre	1998/99	2000/01	2003/04
Portsmouth City Centre	138	144	159
Southsea	43	43	48
Cosham	19	18	46
Gunwharf Quays	-	-	34
North End/London Road	21	19	27
Fratton	n/a	n/a	n/a

Source: Management Horizons Europe (MHE), UK Shopping Centre Index 1998/99; 2000/01 and 2003/04.

Portsmouth City Centre - Catchment Area

Non-Bulky Comparison Goods

- 3.11 Adopting the approach to catchment area definition set out at paragraph 3.7, the catchment area of Portsmouth City Centre for non-bulky comparison goods shopping is defined in **Figure 3.2** overleaf. Not surprisingly, the city centres core catchment extends right across Portsea Island (Zones 9, 10 and 11), whilst its primary catchment covers the Cosham and Havant areas (Zones 12 and 7 respectively). Beyond this, the survey indicates that Portsmouth's trade draw extends more to the north (to Petersfield) than to the west or east. Southampton and Fareham to the west and Chichester to the east constrain the city centre's sphere of influence along the coast, whilst the sea obviously produces an immediate cut-off to the south. Zone 3 (Midhurst) is the only part of the survey area which falls entirely outside Portsmouth City Centre's catchment area. Within the survey area as a whole, Portsmouth City Centre's current market share of available non-bulky comparison goods expenditure of 27% may be compared to the 16% that is captured by Chichester and the 14% and 10% by Fratton and Southampton respectively.

Bulky Comparison Goods

- 3.12 In relation to bulky comparison goods (see **Figure 3.3** overleaf), Portsmouth City Centre's retail offer is significantly weaker as shown by the fact that it generates neither a core nor primary catchment. This is because of the considerable attraction of the out of centre retail parks. However, the city centre does produce a secondary catchment covering most of Portsea Island (Zones 9, 10 and 12), although Zone 11 (the area around North End) ranks as only a tertiary catchment due to the strength of the retail offer at Ocean Park. Within the survey area as a whole, Portsmouth City Centre attracts just 7% of available bulky comparison goods expenditure. In comparison the out of centre retail parks within Portsmouth District collectively generate a market share of 21%, three times the city centre.

Convenience Goods

- 3.13 The catchment area of Portsmouth City Centre for convenience goods shopping is shown in **Figure 3.4** overleaf. Although there are Sainsbury and Tesco supermarkets in the city centre, the retail offer is not sufficiently strong for Portsmouth to generate a core catchment area. The close proximity of the Asda at Fratton and the Waitrose at Southsea serves to spread the

Fig 3.2:

Portsmouth City Centre Catchment Area: Non-Bulky Comparison Goods

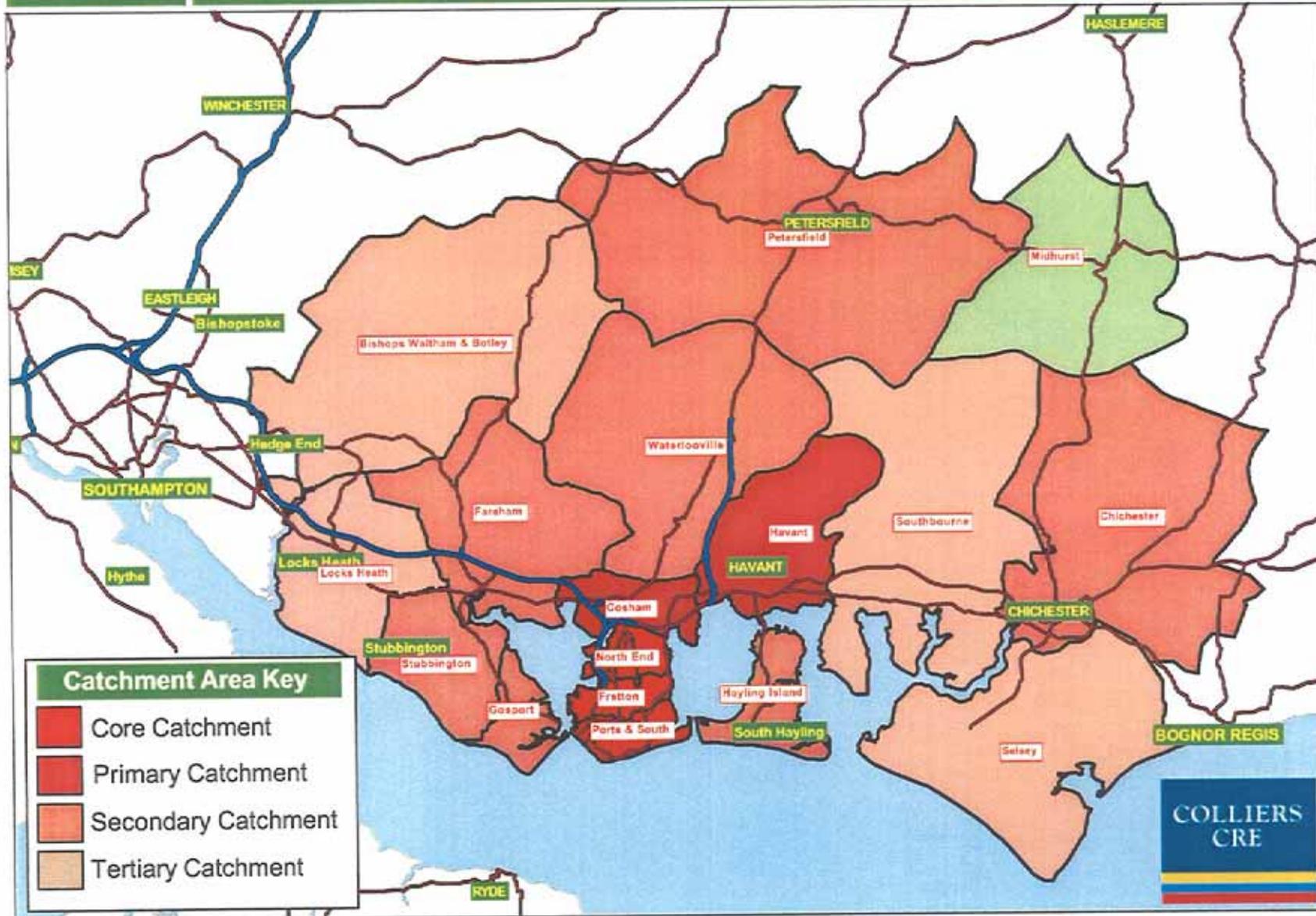


Fig 3.3:

Portsmouth City Centre Catchment Area: Bulky Comparison Goods



Fig 3.4:

Portsmouth City Centre Catchment Area: Convenience Goods



spend around. The city centre's largest market share of 44% falls within Zone 10 (Fratton) and constitutes the primary catchment, whilst Zones 9 and 11 from where Portsmouth City Centre captures 12% and 11% of available spend respectively, form the secondary catchment. Portsmouth City Centre does not have a tertiary catchment for convenience goods.

- 3.14 This 'hierarchy' of market share data, however, does not relate directly to how well a city or town is performing in each goods category and, more importantly, how well it can reasonably be expected to perform in the future. This is because convenience goods shopping is normally undertaken frequently and therefore, locally, irrespective of size of centre, whilst non-bulky comparison goods shopping is carried out much less often and mainly at larger centres. Bulky comparison goods shopping, whilst not carried out all that often, also tends to be undertaken more locally if appropriate retail provision is available. We return to Portsmouth City Centre's present and future role in respect of these three main categories of shopping in Section 5, when we assess the quantitative need for further retail floorspace.

Centre Dominancy

- 3.15 Centres or retail locations which capture the largest single share of available consumer retail expenditure within a zone we describe as being dominant within that area. **Figures 3.5 to 3.7** overleaf show centre dominancy across our survey area for non-bulky and bulky comparison goods and convenience goods shopping respectfully.
- 3.16 Only seven centres dominate **non-bulky comparison goods** shopping across the survey area (see **Figure 3.5**). The map shows clearly how Portsmouth City Centre's retail influence is limited geographically by the strength of competitor centres. Chichester and Fareham are especially dominant in their own areas, although Southampton's influence (even with the new West Quay Shopping Centre) is limited to the western fringe of the survey area (Zone 14, Bishops Waltham & Botley).
- 3.17 With regard to **bulky comparison goods** shopping, eight different centres/retail parks dominate the survey area (See **Figure 3.6**). Bulky goods shopping on Portsea Island is dominated by the retail attraction of Ocean Retail Park, which exerts the largest market share across two of the island's three zones (Zones 9 and 11), together with Cosham (Zone 12) and Hayling Island (Zone 8). The B & Q at Fratton dominates the remaining Zone 10 (Fratton)

Fig 3.5:

Dominance Map: Non-Bulky Comparison Goods

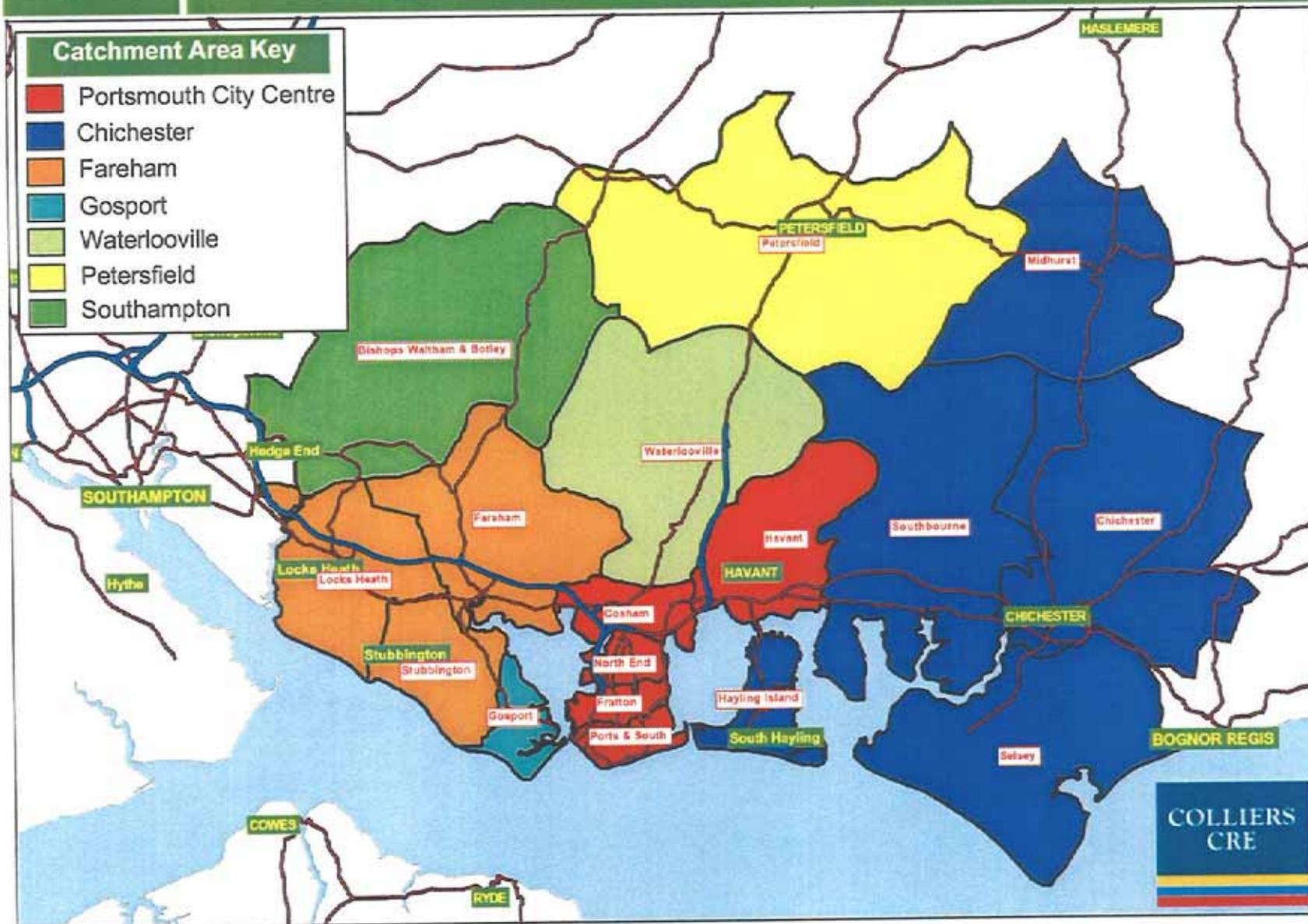


Fig 3.6:

Dominance Map: Bulky Comparison Goods



Fig 3.7:

Dominance Map: Convenience Goods



on the island. Within the rest of the survey area, Chichester, the Newgate Lane Retail Park at Fareham and Hedge End all dominate two zones or more.

- 3.18 In relation to **convenience goods** shopping, the pattern of shopping behaviour is much more localised as demonstrated by the fact that no less than 13 superstores or centres dominate one or more zones across the survey area. In relation to Portsea Island, the Asda at Fratton and the Safeway at North End/London Road are dominant.

Characteristics of Shopper Behaviour

Non-Bulky Comparison Goods Shopping

- 3.19 Our Portsmouth household survey (see **Appendix 1D** for full results) confirms that non-bulky comparison goods shopping is undertaken relatively infrequently by survey area residents. On average, 63% of residents undertake their main trips monthly or less often, the same proportion as for Portsmouth City Centre. The smaller centres such as Cosham and North End/London Road, however, attract more frequent visits, which reflects the localised nature of their catchment areas.
- 3.20 For the survey area as a whole, 65% of households choose their main centre because it is convenient and close to home, whilst for Portsmouth City Centre the proportion is virtually identical at 66%. For those larger retail centres which compete with Portsmouth, such as Southampton, the wide choice of shops and products available emerges as a major reason influencing shopper behaviour. Ease of parking, pedestrian friendly streets and proximity to work appear relatively unimportant in influencing the pattern of shopping trips for non-bulky comparison goods.
- 3.21 More than 40% of those households living within the Portsmouth and Southsea area (Zone 9) do not use the city centre for their main non-bulky comparison goods shopping because of a lack of choice of shops/products. For other nearby zones, an actual dislike of the city centre for shopping shows through, whilst further a-field other factors become more important.
- 3.22 Around two thirds of households within the survey area as a whole use a private car to undertake their main non-bulky comparison goods shopping (56% as driver and 11% as passenger). This is lower than in many other areas, but is consistent with the survey area being largely urban with good public transport options. In comparison only 15% travel by

bus, 13% walk and 2% travel by train. For visits to major competing centres, such as Southampton and Chichester, car use reaches 80% or above, with the bus accounting for virtually all of the balance. For Portsmouth City Centre, only 55% of shoppers arrive by car with 21% using the bus.

3.23 Almost all main non-bulky comparison goods shopping trips originate from home. Average journey times are typically around 11 to 20 minutes across all of the survey area, including trips to Portsmouth City Centre. However, around 70% of those shoppers which use the district centres such as Cosham and North End/London Road as their main centre take 10 minutes or less to reach the shops; thereby confirming the compact nature of their catchment areas.

3.24 In relation to Christmas and other special occasion shopping, Portsmouth reduces in importance slightly, whilst the role of the major nearby competitor centre of Southampton increases. This is typical in that at times of major purchases, consumers favour the better retail offers available at the largest centres and less attractive centres lose share relative to their performance over the rest of the year.

Bulky Comparison Goods Shopping

3.25 Around 86% of survey area households visit their main centre for bulky comparison goods shopping monthly or less often. This compares to 63% for non-bulky comparison goods, indicating that shopping for bulky items – as one may expect – is undertaken less frequently.

3.26 As for non-bulky comparison shopping, convenience of location and range of stores/products available are the most important reasons for choosing which centre to visit. Value for money, good quality goods and ease of parking rate as relatively unimportant.

3.27 Within our survey area, 85% of main bulky comparison goods trips are carried out by car (67% as driver and 18% as passenger), whilst just 9% walk to the shops and only 4% travel by bus.

3.28 Virtually all main bulky comparison goods trips originate from home (99%) and the average journey time for survey area households is around 11 to 20 minutes, similar to non-bulky comparison goods shopping. Only for Southampton do significant numbers of consumers

take 20 minutes or more to reach the shops, reflecting the location of the city outside the survey area.

Convenience Goods Shopping

- 3.29 Almost three-quarters of convenience goods main shopping trips take place during the week (Monday through to Friday), with 63% being carried out during the day and 10% in the evenings. In comparison only 7% are undertaken at weekends, while 20% of households vary their pattern of main food shopping.
- 3.30 The location of a store close to home is the main reason influencing choice of main food shopping destination in 64% of households. Cheap prices/value for money is the second ranked reason (18%), closely followed by a wide choice of goods (14%). Significantly, free/ease of parking is mentioned by just 3% of households overall. The importance of convenience of location is reflected in the fact that 73% of main food shopping trip journeys take (on average) 10 minutes or less.
- 3.31 The most common frequency of carrying out a main food shop is once a week (58% of households), while an additional 35% undertake such trips even more frequently. Shopping for convenience goods is therefore undertaken much more often than for non-bulky and bulky comparison goods.
- 3.32 Around three-quarters of survey area residents use a private car for their main food shopping (61% as driver), while 15% walk and 6% travel by bus. For superstores located out of centre, the proportion of car users is higher, whilst for stores located within centres, walk-in trade is generally much more significant.
- 3.33 For the survey area as a whole, some 96% of main convenience goods trips originate from home and 4% from work. The biggest proportion of work-based trips occurs amongst shoppers visiting the Sainsburys at Hedge End (8% of trips).
- 3.34 Some 22% of households in our survey as a whole link their main food shopping trip with another form of shopping and these trips originate mainly from home. This is less than in many other areas and reflects the number of large free-standing out of centre superstores in the survey area. Overall, 85% of people walk to the other shops / services visited on a linked trip, while only 14% drive. Not surprisingly, walking is particularly prevalent within town

centres. The types of shop / service visited most frequently on a linked trip are the chemist (in 40% of cases), financial outlets (eg. banks and building societies) (39%), and the post office (33%).