

PORTSMOUTH SHOPPING STUDY: UPDATE

On behalf of

PORTSMOUTH CITY COUNCIL

APPENDIX 2B

**QUANTITATIVE NEED ASSESSMENT:
COMPARISON GOODS
SCENARIO 2**

June 2007

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE
Contents

Table 1	Population Change by Zone
Table 2	Expenditure on Comparison Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)
Table 3	Expenditure on Comparison Goods Per Head of Population By Zone (excluding Expenditure by Special Forms of Trading)
Table 4	Total Available Comparison Goods Expenditure By Zone (excluding Expenditure by Special Forms of Trading)
Table 5	Total Available Comparison Goods Expenditure By Zone in the Base Year, 2007 (excl. SFT) Disaggregated Between Non-Bulky and Bulky Comparison Goods
Table 6a	Estimated Non-Bulky Comparison Goods Market Shares by Zone, 2007 (Column Per Cent)
Table 6b	Estimated Bulky Comparison Goods Market Shares by Zone, 2007 (Column Per Cent)
Table 7a	Estimated Non-Bulky Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2007 (£million)
Table 7b	Estimated Bulky Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2007 (£million)
Table 8	Estimated All Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2007 (£million)
Table 9	Estimated All Comparison Goods Market Shares by Zone, 2007 (Column Per Cent)
Table 10	Adjusted All Comparison Goods Market Shares by Zone (Column Per Cent)
Table 11	All Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2011 (£million)
Table 12	Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2011 (£ million)
Table 13	All Comparison Goods Floorspace Need, 2011
Table 14	All Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2016 (£million)
Table 15	Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2016 (£ million)
Table 16	All Comparison Goods Floorspace Need, 2016
Table 17	All Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2021 (£million)
Table 18	Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2021 (£ million)
Table 19	All Comparison Goods Floorspace Need, 2021
Table 20	All Comparison Goods Expenditure Pattern and Centure Turnover Estimates, 2026 (£million)
Table 21	Calculation of Potential All Comparison Goods 'Headroom' Expenditure, 2026 (£ million)
Table 22	All Comparison Goods Floorspace Need, 2026

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 1: Population Change by Zone

Zone	2005	2007 <small>(Base Year)</small>	2011	2016	2021	2026
Zone 1 - Selsey	37,758	37,903	38,426	39,251	40,093	40,954
Zone 2 - Chichester	38,958	39,512	41,202	42,086	42,990	43,913
Zone 3 - Midhurst	9,649	9,725	9,962	10,176	10,394	10,617
Zone 4 - Southbourne	17,102	17,298	17,869	17,789	17,657	17,634
Zone 5 - Petersfield	21,648	21,636	21,826	21,728	21,567	21,539
Zone 6 - Waterlooville	72,263	72,580	73,856	73,525	72,978	72,885
Zone 7 - Havant	55,127	55,215	55,931	57,690	57,185	56,973
Zone 8 - Hayling Island	17,278	17,133	17,023	17,558	17,405	17,340
Zone 9 - Portsmouth & Southsea	70,169	70,890	72,253	72,472	73,514	74,955
Zone 10 - Fratton	43,751	44,007	44,726	44,862	45,507	46,399
Zone 11 - North End	36,302	36,528	37,225	37,338	37,875	38,617
Zone 12 - Cosham	39,422	39,383	39,709	39,829	40,402	41,194
Zone 13 - Fareham	38,038	38,470	39,059	38,953	42,838	46,645
Zone 14 - Bishops Waltham & Botley	30,866	31,464	32,628	35,042	36,098	37,037
Zone 15 - Locks Heath	55,523	56,795	58,950	58,790	64,653	70,399
Zone 16 - Stubbington	58,682	59,400	60,688	60,523	66,559	72,474
Zone 17 - Gosport	45,438	45,826	46,768	46,001	45,380	44,996
Total (All Zones)	687,974	693,765	708,101	713,613	733,095	754,573

Note:

Population figures by zone for 2005, 2007 (our base year) and 2011 are produced by Experian Business Strategies (EBS). Populations by zone for 2016, 2021 and 2026 are derived by applying the appropriate long-term district-based population projections prepared by Hampshire and West Sussex County Councils to each constituent zone.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 2 : Expenditure on Comparison Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾					
	2005	2007 (Base Year)	2011	2016	2021	2026
Zone 1 - Selsey	2,987	3,249	3,845	4,502	5,425	6,537
Zone 2 - Chichester	3,013	3,278	3,879	4,541	5,472	6,594
Zone 3 - Midhurst	2,812	3,059	3,620	4,238	5,107	6,154
Zone 4 - Southbourne	2,994	3,257	3,854	4,513	5,438	6,552
Zone 5 - Petersfield	3,089	3,360	3,977	4,656	5,610	6,760
Zone 6 - Waterlooville	2,980	3,242	3,836	4,491	5,412	6,522
Zone 7 - Havant	2,719	2,958	3,500	4,098	4,938	5,951
Zone 8 - Hayling Island	3,041	3,308	3,915	4,583	5,523	6,655
Zone 9 - Portsmouth & Southsea	2,971	3,232	3,825	4,478	5,396	6,502
Zone 10 - Fratton	2,600	2,828	3,347	3,919	4,722	5,690
Zone 11 - North End	2,880	3,133	3,708	4,341	5,231	6,303
Zone 12 - Cosham	2,669	2,903	3,436	4,023	4,847	5,841
Zone 13 - Fareham	3,033	3,299	3,905	4,571	5,508	6,638
Zone 14 - Bishops Waltham & Botley	3,190	3,470	4,107	4,808	5,794	6,981
Zone 15 - Locks Heath	3,189	3,469	4,105	4,806	5,792	6,979
Zone 16 - Stubbington	2,783	3,027	3,583	4,195	5,054	6,091
Zone 17 - Gosport	2,889	3,143	3,719	4,354	5,247	6,323

Note:

⁽¹⁾ Average consumer expenditure per head on comparison goods for 2005 has been generated by EBS for each zone (see Appendix 1A). These have been projected forwards to our base year of 2007 and our forecast years of 2011, 2016, 2021 and 2026 by adopting the following EBS expenditure per head forecasts:

2005-2007	4.3% per annum
2005-2011	4.3% per annum
2005-2016	3.8% per annum
2005-2021	3.8% per annum
2005-2026	3.8% per annum

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 3 : Expenditure on Comparison Goods Per Head of Population By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾					
	2005	2007 (Base Year)	2011	2016	2021	2026
Zone 1 - Selsey	2,799	3,002	3,511	4,110	4,953	5,968
Zone 2 - Chichester	2,823	3,029	3,541	4,146	4,996	6,020
Zone 3 - Midhurst	2,635	2,827	3,305	3,870	4,663	5,619
Zone 4 - Southbourne	2,805	3,009	3,519	4,120	4,965	5,982
Zone 5 - Petersfield	2,894	3,105	3,631	4,251	5,122	6,172
Zone 6 - Waterlooville	2,792	2,995	3,503	4,101	4,941	5,954
Zone 7 - Havant	2,548	2,733	3,196	3,742	4,509	5,433
Zone 8 - Hayling Island	2,849	3,057	3,574	4,185	5,042	6,076
Zone 9 - Portsmouth & Southsea	2,784	2,986	3,492	4,088	4,926	5,936
Zone 10 - Fratton	2,436	2,613	3,056	3,578	4,311	5,195
Zone 11 - North End	2,699	2,895	3,385	3,963	4,776	5,755
Zone 12 - Cosham	2,501	2,683	3,137	3,673	4,426	5,333
Zone 13 - Fareham	2,842	3,049	3,565	4,174	5,029	6,060
Zone 14 - Bishops Waltham & Botley	2,989	3,207	3,749	4,390	5,290	6,374
Zone 15 - Locks Heath	2,988	3,205	3,748	4,388	5,288	6,372
Zone 16 - Stubbington	2,608	2,797	3,271	3,830	4,615	5,561
Zone 17 - Gosport	2,707	2,904	3,396	3,975	4,790	5,772

Note:

⁽¹⁾ Expenditure per head on comparison goods has been discounted by 6.3% and 7.6% (over the figures in Table 2) for 2005 and the base year of 2007 respectively, to exclude non-store retail sales, which includes e-tailing. These are the latest estimates published by EBS. At 2011 we assume a 8.7% reduction over the figures in Table 2, whilst for 2016, 2021 and 2026 we also assume discounts of 8.7% (see Appendix 1D and paragraphs 5.33 to 5.37 in Section 5).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 4 : Total Available Comparison Goods Expenditure By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Total Available Expenditure (£m) ⁽¹⁾				
	Base Year	Forecast Years			
	2007	2011	2016	2021	2026
Zone 1 - Selsey	113.8	134.9	161.3	198.6	244.4
Zone 2 - Chichester	119.7	145.9	174.5	214.8	264.4
Zone 3 - Midhurst	27.5	32.9	39.4	48.5	59.7
Zone 4 - Southbourne	52.1	62.9	73.3	87.7	105.5
Zone 5 - Petersfield	67.2	79.2	92.4	110.5	132.9
Zone 6 - Waterlooville	217.4	258.7	301.5	360.6	434.0
Zone 7 - Havant	150.9	178.7	215.8	257.8	309.5
Zone 8 - Hayling Island	52.4	60.8	73.5	87.8	105.4
Zone 9 - Portsmouth & Southsea	211.7	252.3	296.3	362.2	445.0
Zone 10 - Fratton	115.0	136.7	160.5	196.2	241.0
Zone 11 - North End	105.7	126.0	148.0	180.9	222.2
Zone 12 - Cosham	105.7	124.6	146.3	178.8	219.7
Zone 13 - Fareham	117.3	139.2	162.6	215.4	282.7
Zone 14 - Bishops Waltham & Botley	100.9	122.3	153.8	190.9	236.1
Zone 15 - Locks Heath	182.1	221.0	258.0	341.9	448.6
Zone 16 - Stubbington	166.2	198.5	231.8	307.1	403.0
Zone 17 - Gosport	133.1	158.8	182.9	217.4	259.7
Total (All Zones)	2,038.5	2,433.6	2,871.8	3,557.0	4,413.7

Note:

⁽¹⁾ Expenditure totals are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head on comparison goods after making appropriate reductions for SFT (Table 3).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 5 : Total Available Comparison Goods Expenditure by Zone in the Base Year, 2007 (excl. SFT) Disaggregated Between Non-Bulky and Bulky Comparison Goods

Zone	Non-Bulky Comparison Goods ⁽¹⁾ (£m)	Bulky Comparison Goods ⁽¹⁾ (£m)	Total Comparison Goods ⁽²⁾ (£m)
	A	B	A + B = C
Zone 1 - Selsey	76.4	37.4	113.8
Zone 2 - Chichester	81.7	37.9	119.7
Zone 3 - Midhurst	18.7	8.8	27.5
Zone 4 - Southbourne	35.3	16.8	52.1
Zone 5 - Petersfield	45.9	21.3	67.2
Zone 6 - Waterlooville	147.8	69.8	217.4
Zone 7 - Havant	103.5	47.4	150.9
Zone 8 - Hayling Island	35.2	17.1	52.4
Zone 9 - Portsmouth & Southsea	148.4	63.3	211.7
Zone 10 - Fratton	79.0	36.0	115.0
Zone 11 - North End	72.1	33.6	105.7
Zone 12 - Cosham	72.3	33.4	105.7
Zone 13 - Fareham	79.5	37.8	117.3
Zone 14 - Bishops Waltham & Botley	68.9	32.0	100.9
Zone 15 - Locks Heath	124.0	58.1	182.1
Zone 16 - Stubbington	113.0	53.0	166.2
Zone 17 - Gosport	90.9	42.2	133.1
Total (All Zones)	1,392.7	645.8	2,038.5

Notes:

⁽¹⁾ For each zone, we disaggregate total available comparison goods expenditure into spend on non-bulky and bulky comparison goods. This allocation is based on the consumer expenditure data produced by EBS for each zone (see Appendix 1A).

⁽²⁾ Figures derived from Table 4.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 6a : Estimated Non-Bulky Goods Centre Market Shares by Zone, 2007 (Column Per Cent)

Retail Supply : Where the Money is Spent	Consumer Demand : Where the Money Comes From (Zone)																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<u>Within the District</u>																	
Portsmouth City Centre	7.2	11.9	1.6	4.4	17.5	26.1	34.0	29.1	50.5	80.9	64.8	35.1	16.9	5.4	9.8	16.2	22.4
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.6	1.2	0.0	0.0	0.0	0.0	0.3	9.4	0.6	0.0	0.0	0.0	0.0
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gunwharf Quays	3.7	0.6	0.0	3.2	2.7	2.2	2.6	3.3	12.0	3.2	7.3	3.8	2.6	2.4	0.6	2.0	5.1
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.1	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	1.1	1.9	0.0	0.5	1.0	0.8	2.0	3.0	12.8	3.2	1.8	6.5	1.5	0.4	1.1	0.0	1.2
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<u>Outside the District</u>																	
Chichester	55.8	57.5	57.0	75.8	12.6	8.3	33.0	36.2	3.0	1.6	2.0	8.9	2.4	0.6	1.5	0.4	1.5
Fareham	0.0	0.0	0.0	0.0	1.4	4.9	2.4	0.0	0.0	0.8	0.0	11.3	58.6	15.0	46.2	48.0	16.2
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.0	10.3	36.5
Havant	0.1	0.7	0.0	2.0	0.1	3.6	16.1	8.8	0.0	0.0	0.0	1.4	0.0	0.0	0.5	0.0	0.0
Hedge End	0.2	1.3	0.0	1.4	2.0	1.0	0.0	4.4	0.0	0.7	0.5	4.0	1.0	11.4	5.7	1.0	0.6
Southampton	1.5	1.4	0.0	3.9	6.7	5.4	4.2	4.2	11.0	4.8	2.8	7.7	6.5	39.3	26.8	13.1	11.4
Waterlooville	0.0	0.7	0.0	0.0	6.6	44.1	1.6	0.5	0.0	0.0	0.6	4.6	0.5	0.0	0.0	0.7	0.0
All other centres/Stores	30.4	24.0	41.4	8.8	48.8	2.4	4.1	10.5	7.7	2.7	5.8	7.3	9.3	25.3	7.8	8.3	5.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the 2004 Portsmouth household telephone survey carried out by Colliers CRE. We assume that shopping patterns will not have changed materially between 2004 and 2007.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 6b : Estimated Bulky Goods Centre Market Shares by Zone, 2007 (Column Per Cent)

Retail Supply : Where the Money is Spent	Consumer Demand : Where the Money Comes From (Zone)																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<u>Within the District</u>																	
Portsmouth City Centre	5.6	7.4	0.0	0.9	4.6	7.6	7.6	6.9	16.5	25.1	9.1	12.9	1.9	0.0	1.6	0.0	0.8
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.5	4.9	0.4	0.2	0.0	0.0	0.0	0.0	0.0
Gunwharf Quays	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	3.8	2.7	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	3.0	2.1	0.0	3.6	2.2	0.0	0.9	2.7	2.2	0.7	0.8	4.8	0.0	0.0	1.1	0.0	0.0
Out of Centre Retail Parks	0.0	1.5	0.4	1.8	9.7	13.9	22.2	29.6	59.8	61.5	86.4	55.1	9.1	0.0	1.6	0.0	1.2
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.2	1.7	0.0	0.0	0.0	0.0
<u>Outside the District</u>																	
Chichester	54.9	65.2	54.4	66.5	7.9	0.0	1.9	8.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6
Fareham	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	3.0	50.3	5.5	35.7	64.1	57.6
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	1.6	5.7	20.5
Havant	1.0	1.4	2.1	12.8	17.6	28.6	55.7	17.5	0.5	0.0	0.0	1.7	6.9	0.0	7.6	0.8	0.0
Hedge End	1.0	0.9	0.0	0.0	4.7	4.7	0.0	0.9	3.4	0.0	0.8	6.9	3.8	82.2	24.5	18.8	9.3
Southampton	2.0	0.9	0.0	1.3	4.2	3.9	1.3	3.4	1.6	0.0	0.0	4.4	2.9	6.3	4.7	3.3	0.0
Waterlooville	0.0	1.7	2.6	3.7	13.6	38.5	2.8	0.9	0.4	0.7	0.0	3.0	0.0	0.0	0.0	0.0	0.0
All other centres/Stores	32.5	18.9	40.5	9.4	34.8	0.5	3.8	25.5	12.9	6.1	0.9	4.8	23.4	6.0	21.6	7.3	9.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

The market share percentages are derived from the 2004 Portsmouth household telephone survey carried out by Colliers CRE. We assume that shopping patterns will not have changed materially between 2004 and 2007.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 7a : Estimated Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2007 (£million)

Retail Supply : Where the Money is Spent	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		Total Comparison Goods Turnover Potential
																			(%)	(£m)	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	A	B		C=A+B
<u>Within the District</u>																					
Portsmouth City Centre	5.5	9.7	0.3	1.6	8.0	38.6	35.2	10.3	74.9	63.9	46.7	25.4	13.4	3.7	12.2	18.3	20.4	388.1	10	38.8	426.9
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	1.8	0.0	0.0	0.0	0.0	0.2	6.8	0.5	0.0	0.0	0.0	0.0	9.5	0	0.0	9.5
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0	0.0	2.1
Gunwharf Quays	2.8	0.5	0.0	1.1	1.2	3.3	2.7	1.2	17.8	2.5	5.3	2.7	2.1	1.7	0.7	2.3	4.6	52.5	25	13.1	65.6
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.2	0.0	0.0	0.0	0.0	0.0	0.0	10.2	0	0.0	10.2
Southsea Town Centre	0.8	1.6	0.0	0.2	0.5	1.2	2.1	1.1	19.0	2.5	1.3	4.7	1.2	0.3	1.4	0.0	1.1	38.8	15	5.8	44.6
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0	0.0	0.0
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0	0.0	4.1
<u>Outside the District</u>																					
Chichester	42.6	47.0	10.7	26.8	5.8	12.3	34.2	12.8	4.5	1.3	1.4	6.4	1.9	0.4	1.9	0.5	1.4	211.6			
Fareham	0.0	0.0	0.0	0.0	0.6	7.2	2.5	0.0	0.0	0.6	0.0	8.2	46.6	10.3	57.3	54.2	14.7	202.3			
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	11.6	33.2	45.0			
Havant	0.1	0.6	0.0	0.7	0.0	5.3	16.7	3.1	0.0	0.0	0.0	1.0	0.0	0.0	0.6	0.0	0.0	28.1			
Hedge End	0.2	1.1	0.0	0.5	0.9	1.5	0.0	1.6	0.0	0.6	0.4	2.9	0.8	7.9	7.1	1.1	0.5	26.9			
Southampton	1.1	1.1	0.0	1.4	3.1	8.0	4.3	1.5	16.3	3.8	2.0	5.6	5.2	27.1	33.2	14.8	10.4	138.9			
Waterlooville	0.0	0.6	0.0	0.0	3.0	65.2	1.7	0.2	0.0	0.0	0.4	3.3	0.4	0.0	0.0	0.8	0.0	75.6			
All other centres/Stores	23.2	19.6	7.7	3.1	22.4	3.5	4.2	3.7	11.4	2.1	4.2	5.3	7.4	17.4	9.7	9.4	4.6	159.0			
Total Available Expenditure (from Table 5, Col. A)	76.4	81.7	18.7	35.3	45.9	147.8	103.5	35.2	148.4	79.0	72.1	72.3	79.5	68.9	124.0	113.0	90.9	1,392.7			

Note:
For each cell, the monetary figure is derived by multiplying the 2007 available non-bulky comparison goods expenditure in the zone (Table 5, Col. A) by the 2007 market share of the specified centre in that zone (Table 6a).
⁽¹⁾ Estimated by Colliers CRE.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 7b : Estimated Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2007 (£million)

Retail Supply : Where the Money is Spent	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		Total Comparison Goods Turnover Potential
																			(%)	(£m)	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	A	B	C=A+B	
Within the District																					
Portsmouth City Centre	2.1	2.8	0.0	0.2	1.0	5.3	3.6	1.2	10.4	9.0	3.1	4.3	0.7	0.0	0.9	0.0	0.3	45.0	10	4.5	49.4
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	1.9	0	0.0	1.9
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	1.8	0.1	0.1	0.0	0.0	0.0	0.0	0.0	2.6	0	0.0	2.6
Gunwharf Quays	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	25	0.2	0.9
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.5	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0	0.0	2.8
Southsea Town Centre	1.1	0.8	0.0	0.6	0.5	0.0	0.4	0.5	1.4	0.3	0.3	1.6	0.0	0.0	0.6	0.0	0.0	8.0	15	1.2	9.2
Out of Centre Retail Parks	0.0	0.6	0.0	0.3	2.1	9.7	10.5	5.1	37.9	22.1	29.1	18.4	3.4	0.0	0.9	0.0	0.5	140.6	0	0.0	140.6
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.4	0.6	0.0	0.0	0.0	0.0	1.9	0	0.0	1.9
Outside the District																					
Chichester	20.6	24.7	4.8	11.1	1.7	0.0	0.9	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	66.1			
Fareham	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1.0	19.0	1.8	20.7	34.0	24.3	101.2			
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.9	3.0	8.6	12.7			
Havant	0.4	0.5	0.2	2.1	3.7	20.0	26.4	3.0	0.3	0.0	0.0	0.6	2.6	0.0	4.4	0.4	0.0	64.7			
Hedge End	0.4	0.3	0.0	0.0	1.0	3.3	0.0	0.2	2.2	0.0	0.3	2.3	1.4	26.3	14.2	10.0	3.9	65.7			
Southampton	0.7	0.3	0.0	0.2	0.9	2.7	0.6	0.6	1.0	0.0	0.0	1.5	1.1	2.0	2.7	1.7	0.0	16.2			
Waterlooville	0.0	0.6	0.2	0.6	2.9	26.9	1.3	0.2	0.3	0.3	0.0	1.0	0.0	0.0	0.0	0.0	0.0	34.2			
All other centres/Stores	12.2	7.2	3.6	1.6	7.4	0.3	1.8	4.4	8.2	2.2	0.3	1.6	8.8	1.9	12.5	3.9	3.8	81.6			
Total Available Expenditure (from Table 5, Col. B)	37.4	37.9	8.8	16.8	21.3	69.8	47.4	17.1	63.3	36.0	33.6	33.4	37.8	32.0	58.1	53.0	42.2	645.8			

Note:
For each cell, the monetary figure is derived by multiplying the 2007 available bulky comparison goods expenditure in the zone (Table 5, Col. B) by the 2007 market share of the specified centre in that zone (Table 6b).
⁽¹⁾ Estimated by Colliers CRE.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 8 : Estimated All Comparison Goods Expenditure Patterns and Centre Turnover Estimates, 2007 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Comparison Goods Turnover Potential	Comparison Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) ⁽³⁾	Benchmark Comparison Goods Turnover (£m)	Extent of Any Over/Under Trading (£m)		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17									A	B
Within the District																											
Portsmouth City Centre	7.6	12.5	0.3	1.7	9.0	43.9	38.8	11.4	85.4	73.0	49.8	29.7	14.2	3.7	13.1	18.3	20.7	433.0	43.3	476.3	49,104	9,701	5,500	270.1	206.3		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	3.0	0.0	0.0	0.0	0.0	0.2	7.5	0.5	0.0	0.0	0.0	0.0	11.4	0.0	11.4	5,683	2,004	2,750	15.6	-4.2		
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.8	3.4	0.1	0.1	0.0	0.0	0.0	0.0	0.0	4.7	0.0	4.7	4,210	1,107	2,500	10.5	-5.9		
Gunwharf Quays	2.8	0.5	0.0	1.1	1.4	3.3	2.7	1.2	18.1	2.8	5.3	2.7	2.1	1.7	0.7	2.3	4.6	53.2	13.3	66.5	10,748	6,189	6,000	64.5	2.0		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.5	0.0	0.0	10.7	0.0	0.0	0.0	0.0	0.0	0.0	13.0	0.0	13.0	12,607	1,029	2,500	31.5	-18.5		
Southsea Town Centre	2.0	2.3	0.0	0.8	0.9	1.2	2.5	1.5	20.4	2.8	1.6	6.3	1.2	0.3	2.0	0.0	1.1	46.8	7.0	53.8	21,555	2,498	3,000	64.7	-10.8		
Out of Centre Retail Parks	0.0	0.6	0.0	0.3	2.1	9.7	10.5	5.1	37.9	22.1	29.1	18.4	3.4	0.0	0.9	0.0	0.5	140.6	0.0	140.6	36,718	3,828	2,500	91.8	48.8		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.4	0.6	0.0	0.0	0.0	0.0	5.9	0.0	5.9	-	-	-	5.9	0.0		
Outside the District																											
Chichester	63.2	71.7	15.4	37.9	7.5	12.3	35.1	14.2	4.7	1.3	1.4	6.4	1.9	0.4	1.9	0.5	2.0	277.8									
Fareham	0.0	0.0	0.0	0.0	0.6	7.7	2.5	0.0	0.0	0.6	0.0	9.2	65.6	12.1	78.0	88.2	39.0	303.5									
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.9	14.7	41.8	57.7									
Havant	0.5	1.1	0.2	2.9	3.8	25.3	43.1	6.1	0.3	0.0	0.0	1.6	2.6	0.0	5.0	0.4	0.0	92.8									
Hedge End	0.5	1.4	0.0	0.5	1.9	4.8	0.0	1.7	2.2	0.6	0.6	5.2	2.2	34.1	21.3	11.1	4.5	92.6									
Southampton	1.9	1.5	0.0	1.6	4.0	10.7	5.0	2.1	17.3	3.8	2.0	7.0	6.3	29.1	36.0	16.6	10.4	155.1									
Waterlooville	0.0	1.2	0.2	0.6	5.9	92.1	3.0	0.3	0.3	0.3	0.4	4.3	0.4	0.0	0.0	0.8	0.0	109.8									
All other centres/stores	35.4	26.8	11.3	4.7	29.8	3.9	6.0	8.1	19.5	4.3	4.5	6.9	16.2	19.4	22.2	13.2	8.4	240.7									
Total Available Expenditure (from Table 5, Col. C)	113.8	119.7	27.5	52.1	67.2	217.4	150.9	52.4	211.7	115.0	105.7	105.7	117.3	100.9	182.1	166.2	133.1	2,038.5									

Note:
This table is calculated by adding together Tables 7a and 7b.
⁽¹⁾ Derived from adding together Table 7a (Col. B) and Table 7b (Col. B).
⁽²⁾ Floorspace based on data supplied by Portsmouth City Council (see Appendix 2A).
⁽³⁾ Colliers CRE estimates.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE
Table 9 : Estimated All Comparison Goods Market Shares by Zone, 2007 (Column Per Cent)

Centre	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<u>Within the District</u>																	
Portsmouth City Centre	6.7	10.5	1.1	3.3	13.4	20.2	25.7	21.8	40.3	63.4	47.1	28.1	12.1	3.7	7.2	11.0	15.6
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.4	1.4	0.0	0.0	0.0	0.0	0.2	7.1	0.4	0.0	0.0	0.0	0.0
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	3.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Gunwharf Quays	2.5	0.4	0.0	2.2	2.1	1.5	1.8	2.2	8.6	2.4	5.0	2.6	1.8	1.6	0.4	1.4	3.5
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.9	0.0	0.0	10.1	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	1.7	2.0	0.0	1.5	1.4	0.5	1.7	2.9	9.6	2.4	1.5	6.0	1.0	0.3	1.1	0.0	0.8
Out of Centre Retail Parks	0.0	0.5	0.1	0.6	3.1	4.5	7.0	9.7	17.9	19.2	27.5	17.4	2.9	0.0	0.5	0.0	0.4
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.4	0.5	0.0	0.0	0.0	0.0
<u>Outside the District</u>																	
Chichester	55.5	59.9	56.2	72.9	11.1	5.6	23.2	27.1	2.2	1.1	1.4	6.1	1.6	0.4	1.0	0.3	1.5
Fareham	0.0	0.0	0.0	0.0	1.0	3.5	1.6	0.0	0.0	0.5	0.0	8.7	55.9	12.0	42.9	53.1	29.3
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.5	8.8	31.4
Havant	0.4	0.9	0.7	5.5	5.6	11.6	28.5	11.6	0.1	0.0	0.0	1.5	2.2	0.0	2.8	0.3	0.0
Hedge End	0.5	1.2	0.0	1.0	2.9	2.2	0.0	3.3	1.0	0.5	0.6	4.9	1.9	33.8	11.7	6.7	3.4
Southampton	1.7	1.2	0.0	3.1	5.9	4.9	3.3	3.9	8.2	3.3	1.9	6.7	5.3	28.8	19.8	10.0	7.8
Waterlooville	0.0	1.0	0.8	1.2	8.8	42.3	2.0	0.6	0.1	0.2	0.4	4.1	0.3	0.0	0.0	0.5	0.0
All other centres/Stores	31.1	22.4	41.1	9.0	44.4	1.8	4.0	15.4	9.2	3.8	4.2	6.5	13.8	19.2	12.2	8.0	6.3
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Note:

Market shares are derived from figures in Table 8.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE
Table 10 : Adjusted All Comparison Goods Market Shares by Zone (Column Per Cent)

Centre	Zone																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<u>Within the District</u>																	
Portsmouth City Centre	7.9	12.4	1.3	3.9	15.8	23.8	30.3	25.8	48.4	72.9	55.6	33.6	14.2	4.4	8.5	13.0	18.4
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.4	1.4	0.0	0.0	0.0	0.0	0.2	7.1	0.4	0.0	0.0	0.0	0.0
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	3.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Gunwharf Quays	2.5	0.4	0.0	2.2	2.1	1.5	1.8	2.2	8.6	2.4	5.0	2.6	1.8	1.6	0.4	1.4	3.5
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.9	0.0	0.0	10.1	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	1.7	2.0	0.0	1.5	1.4	0.5	1.7	2.9	9.6	2.4	1.5	6.0	1.0	0.3	1.1	0.0	0.8
Out of Centre Retail Parks	0.0	0.5	0.1	0.6	3.1	4.5	7.0	9.7	17.9	19.2	27.5	17.4	2.9	0.0	0.5	0.0	0.4
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.4	0.5	0.0	0.0	0.0	0.0
<u>Outside the District</u>																	
Chichester	54.3	58.0	55.9	72.4	11.1	5.3	21.0	24.5	1.8	0.0	0.0	5.3	1.6	0.4	1.0	0.3	1.5
Fareham	0.0	0.0	0.0	0.0	1.0	3.5	1.6	0.0	0.0	0.0	0.0	6.7	54.4	12.0	41.6	51.1	28.0
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.5	8.8	30.0
Havant	0.4	0.9	0.7	5.5	5.6	10.7	26.1	11.6	0.1	0.0	0.0	1.5	2.2	0.0	2.8	0.3	0.0
Hedge End	0.5	1.2	0.0	1.0	2.9	2.2	0.0	3.3	1.0	0.0	0.0	4.9	1.9	33.3	11.7	6.7	3.4
Southampton	1.7	1.2	0.0	3.1	5.9	4.9	3.3	3.9	4.6	0.0	0.0	5.1	5.3	28.8	19.8	10.0	7.8
Waterlooville	0.0	1.0	0.8	1.2	8.8	40.0	2.0	0.6	0.1	0.0	0.0	4.1	0.3	0.0	0.0	0.5	0.0
All other centres/Stores	31.1	22.4	41.1	8.9	41.9	1.7	4.0	14.0	5.2	0.0	0.0	5.5	13.1	19.0	12.2	8.1	6.3
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Note:

The market share percentages for Portsmouth City Centre have been adjusted upwards a little from those set out in Table 9. The market shares for major competitor centres have been reduced from those in Table 9 in order that the columns continue to sum to 100%.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 11 : All Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2011 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<u>Within the District</u>																							
Portsmouth City Centre	10.6	18.0	0.4	2.4	12.5	61.6	54.2	15.7	122.1	99.7	70.0	41.9	19.8	5.3	18.7	25.8	29.1	608.1	10	60.8	669.0		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	3.5	0.0	0.0	0.0	0.0	0.3	8.8	0.6	0.0	0.0	0.0	0.0	13.5	0	0.0	13.5		
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.9	4.1	0.2	0.1	0.0	0.0	0.0	0.0	0.0	5.5	0	0.0	5.5		
Gunwharf Quays	3.3	0.6	0.0	1.4	1.6	3.9	3.2	1.4	21.6	3.3	6.3	3.2	2.5	2.0	0.9	2.7	5.5	63.4	25	15.8	79.2		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.5	0.0	0.0	12.8	0.0	0.0	0.0	0.0	0.0	0.0	15.4	0	0.0	15.4		
Southsea Town Centre	2.3	2.9	0.0	0.9	1.1	1.4	3.0	1.8	24.3	3.3	1.9	7.4	1.4	0.3	2.4	0.0	1.3	55.7	15	8.4	64.1		
Out of Centre Retail Parks	0.0	0.7	0.0	0.4	2.4	11.5	12.5	5.9	45.1	26.3	34.6	21.7	4.1	0.0	1.1	0.0	0.6	167.0	0	0.0	167.0		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	0.0	0.0	0.5	0.8	0.0	0.0	0.0	0.0	7.1	0	0.0	7.1		
<u>Outside the District</u>																							
Chichester	73.3	84.7	18.4	45.5	8.8	13.6	37.5	14.9	4.6	0.0	0.0	6.6	2.3	0.5	2.3	0.5	2.4	315.9					
Fareham	0.0	0.0	0.0	0.0	0.8	9.1	2.9	0.0	0.0	0.0	0.0	8.4	75.8	14.7	91.9	101.4	44.4	349.4					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	1.1	17.5	47.6	66.5					
Havant	0.5	1.3	0.2	3.4	4.5	27.7	46.7	7.1	0.4	0.0	0.0	1.9	3.1	0.0	6.1	0.5	0.0	103.5					
Hedge End	0.6	1.7	0.0	0.6	2.3	5.7	0.0	2.0	2.6	0.0	0.0	6.1	2.6	40.7	25.8	13.3	5.3	109.3					
Southampton	2.2	1.8	0.0	1.9	4.7	12.7	5.9	2.4	11.6	0.0	0.0	6.3	7.4	35.3	43.6	19.8	12.4	168.1					
Waterlooville	0.0	1.5	0.3	0.7	7.0	103.5	3.5	0.4	0.3	0.0	0.0	5.1	0.5	0.0	0.0	0.9	0.0	123.7					
All other centres/stores	41.9	32.7	13.5	5.6	33.2	4.4	7.2	8.5	13.0	0.0	0.0	6.8	18.3	23.3	27.0	16.0	10.1	261.4					
Total Available Expenditure (from Table 4)	134.9	145.9	32.9	62.9	79.2	258.7	178.7	60.8	252.3	136.7	126.0	124.6	139.2	122.3	221.0	198.5	158.8	2,433.6					

Note:
For each cell, the monetary figure is derived by multiplying the 2011 available comparison goods expenditure in the zone (Table 4) by the adjusted comparison goods market share of the specified centre in that zone (Table 10).
⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 12 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure for Portsmouth District, 2011 (£ million)

Centre	2007 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A <i>[from Table 8 Col.C]</i>	B <i>[from Table 11]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	476.3	669.0	24.6	644.4	168.0
Cosham Suburban Centre	11.4	13.5	1.4	12.0	0.7
Fratton Suburban Centre	4.7	5.5	1.0	4.6	-0.1
Gunwharf Quays	66.5	79.2	5.9	73.3	6.8
North End/London Road Suburban Centre	13.0	15.4	2.9	12.6	-0.4
Southsea Town Centre	53.8	64.1	5.9	58.2	4.4
Sub-Total	625.7	846.7	41.6	805.1	179.4
Out of Centre Retail Parks	140.6	167.0	8.3	158.6	18.1
All other local centres/stores	5.9	7.1	0.5	6.5	0.6
Total	772.2	1,020.7	50.4	970.3	198.1

Note:

⁽¹⁾ We assume that existing comparison goods floorspace at the base year (2007) will achieve real sales productivity gains of 2.20% per annum. This figure is based on the latest published research by EBS (see Appendix 1E). The store productivity gains are applied to the 2007 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 13 : All Comparison Goods Floorspace Need in Portsmouth District, 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2011 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 12 Col. E]	[From Table 8 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	168.0	206.3	374.3	351.9	22.4	6,250	3,587
Cosham Suburban Centre	0.7	-4.2	-3.6	0.1	-3.7	3,250	-1,133
Fratton Suburban Centre	-0.1	-5.9	-5.9	0.0	-5.9	2,750	-2,163
Gunwharf Quays	6.8	2.0	8.9	6.8	2.1	6,750	305
North End/London Road Suburban Centre	-0.4	-18.5	-19.0	0.8	-19.8	2,750	-7,184
Southsea Town Centre	4.4	-10.8	-6.4	0.5	-6.9	3,500	-1,984
Sub-Total	179.4	168.8	348.2	360.1	-11.9	-	-8,572
Out of Centre Retail Parks	18.1	48.8	66.8	28.9	37.9	2,750	13,794
All other local centres/stores	0.6	0.0	0.6	0.0	0.6	2,750	215
Total	198.1	217.6	415.7	389.0	26.7	-	5,436

Notes:

⁽¹⁾ Details of comparison goods commitments are set out in Appendix 2C.

⁽²⁾ The derivation of our sales density estimates are set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 14 : All Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
Within the District																							
Portsmouth City Centre	12.7	21.6	0.5	2.8	14.6	71.8	65.5	18.9	143.4	117.1	82.2	49.2	23.2	6.7	21.9	30.1	33.6	715.8	10	71.6	787.3		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.4	4.1	0.0	0.0	0.0	0.0	0.3	10.3	0.7	0.0	0.0	0.0	0.0	15.8	0	0.0	15.8		
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.1	4.8	0.2	0.1	0.0	0.0	0.0	0.0	0.0	6.5	0	0.0	6.5		
Gunwharf Quays	4.0	0.7	0.0	1.6	1.9	4.5	3.8	1.6	25.4	3.9	7.4	3.8	2.9	2.5	1.1	3.2	6.4	74.6	25	18.6	93.2		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.6	0.0	0.0	15.0	0.0	0.0	0.0	0.0	0.0	0.0	18.2	0	0.0	18.2		
Southsea Town Centre	2.8	3.4	0.0	1.1	1.3	1.6	3.6	2.1	28.5	3.9	2.2	8.7	1.7	0.4	2.8	0.0	1.5	65.7	15	9.9	75.5		
Out of Centre Retail Parks	0.0	0.8	0.1	0.4	2.8	13.5	15.0	7.1	53.0	30.9	40.7	25.5	4.8	0.0	1.3	0.0	0.7	196.5	0	0.0	196.5		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.0	0.0	0.6	0.9	0.0	0.0	0.0	0.0	8.3	0	0.0	8.3		
Outside the District																							
Chichester	87.7	101.3	22.0	53.0	10.3	15.9	45.3	18.0	5.4	0.0	0.0	7.8	2.6	0.6	2.6	0.6	2.8	375.9					
Fareham	0.0	0.0	0.0	0.0	0.9	10.6	3.6	0.0	0.0	0.0	0.0	9.9	88.5	18.4	107.3	118.4	51.1	408.7					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	1.3	20.4	54.8	76.9					
Havant	0.6	1.6	0.3	4.0	5.2	32.3	56.4	8.6	0.4	0.0	0.0	2.2	3.6	0.0	7.1	0.6	0.0	122.9					
Hedge End	0.7	2.0	0.0	0.7	2.6	6.6	0.0	2.4	3.0	0.0	0.0	7.2	3.1	51.2	30.2	15.5	6.1	131.4					
Southampton	2.7	2.2	0.0	2.2	5.5	14.8	7.1	2.9	13.6	0.0	0.0	7.4	8.7	44.4	51.0	23.1	14.2	199.7					
Waterlooville	0.0	1.8	0.3	0.9	8.1	120.6	4.3	0.5	0.4	0.0	0.0	6.0	0.6	0.0	0.0	1.1	0.0	144.5					
All other centres/stores	50.2	39.1	16.2	6.5	38.7	5.1	8.6	10.3	15.3	0.0	0.0	8.0	21.4	29.3	31.5	18.7	11.6	310.3					
Total Available Expenditure (from Table 4)	161.3	174.5	39.4	73.3	92.4	301.5	215.8	73.5	296.3	160.5	148.0	146.3	162.6	153.8	258.0	231.8	182.9	2,871.8					

Note:
For each cell, the monetary figure is derived by multiplying the 2016 available comparison goods expenditure in the zone (Table 4) by the adjusted comparison goods market share of the specified centre in that zone (Table 10).
⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 15 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure for Portsmouth District, 2016 (£ million)

Centre	2007 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A <i>[from Table 8 Col.C]</i>	B <i>[from Table 14]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	476.3	787.3	58.4	728.9	252.6
Cosham Suburban Centre	11.4	15.8	3.4	12.4	1.0
Fratton Suburban Centre	4.7	6.5	2.3	4.2	-0.4
Gunwharf Quays	66.5	93.2	14.0	79.3	12.8
North End/London Road Suburban Centre	13.0	18.2	6.8	11.4	-1.6
Southsea Town Centre	53.8	75.5	14.0	61.5	7.7
Sub-Total	625.7	996.6	98.8	897.7	272.0
Out of Centre Retail Parks	140.6	196.5	19.9	176.7	36.1
All other local centres/stores	5.9	8.3	1.3	7.0	1.1
Total	772.2	1,201.4	120.0	1,081.4	309.2

Note:

⁽¹⁾ We assume that existing comparison goods floorspace at the base year (2007) will achieve real sales productivity gains of 2.20% per annum. This figure is based on the latest published research by EBS (see Appendix 1E). The store productivity gains are applied to the 2007 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 16 : All Comparison Goods Floorspace Need in Portsmouth District, 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2016 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 15 Col. E]	[From Table 8 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	252.6	206.3	458.8	376.5	82.3	6,970	11,813
Cosham Suburban Centre	1.0	-4.2	-3.2	0.1	-3.3	3,620	-920
Fratton Suburban Centre	-0.4	-5.9	-6.3	0.0	-6.3	3,070	-2,050
Gunwharf Quays	12.8	2.0	14.8	7.6	7.2	7,530	956
North End/London Road Suburban Centre	-1.6	-18.5	-20.1	0.9	-21.0	3,070	-6,850
Southsea Town Centre	7.7	-10.8	-3.1	0.6	-3.7	3,900	-959
Sub-Total	272.0	168.8	440.8	385.7	55.1	-	1,991
Out of Centre Retail Parks	36.1	48.8	84.9	32.5	52.4	3,070	17,061
All other local centres/stores	1.1	0.0	1.1	0.0	1.1	3,070	349
Total	309.2	217.6	526.8	418.2	108.6	-	19,401

Notes:

⁽¹⁾ Details of comparison goods commitments are set out in Appendix 2C.

⁽²⁾ The derivation of our sales density estimates are set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 17 : All Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<u>Within the District</u>																							
Portsmouth City Centre	15.6	26.5	0.6	3.4	17.5	85.9	78.2	22.6	175.3	143.1	100.5	60.1	30.7	8.3	29.0	39.9	39.9	877.2	10.0	87.7	964.9		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.5	4.9	0.0	0.0	0.0	0.0	0.4	12.6	0.9	0.0	0.0	0.0	0.0	19.2	0.0	0.0	19.2		
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.3	5.8	0.2	0.1	0.0	0.0	0.0	0.0	0.0	7.9	0.0	0.0	7.9		
Gunwharf Quays	4.9	0.9	0.0	1.9	2.3	5.4	4.6	1.9	31.0	4.7	9.0	4.6	3.8	3.1	1.4	4.2	7.6	91.4	25.0	22.9	114.3		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.8	0.0	0.0	18.3	0.0	0.0	0.0	0.0	0.0	0.0	22.2	0.0	0.0	22.2		
Southsea Town Centre	3.4	4.2	0.0	1.3	1.5	2.0	4.3	2.5	34.9	4.7	2.7	10.7	2.2	0.5	3.8	0.0	1.8	80.5	15.0	12.1	92.5		
Out of Centre Retail Parks	0.0	1.0	0.1	0.5	3.4	16.1	18.0	8.5	64.8	37.8	49.7	31.1	6.3	0.0	1.7	0.0	0.8	239.8	0.0	0.0	239.8		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.4	0.0	0.0	0.7	1.2	0.0	0.0	0.0	0.0	10.2	0.0	0.0	10.2		
<u>Outside the District</u>																							
Chichester	107.9	124.7	27.1	63.4	12.3	19.0	54.1	21.5	6.6	0.0	0.0	9.5	3.5	0.8	3.5	0.8	3.3	457.9					
Fareham	0.0	0.0	0.0	0.0	1.1	12.7	4.2	0.0	0.0	0.0	0.0	12.1	117.3	22.9	142.2	156.9	60.8	530.1					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.3	1.7	27.1	65.2	94.4					
Havant	0.8	2.0	0.3	4.8	6.2	38.6	67.4	10.2	0.5	0.0	0.0	2.7	4.8	0.0	9.5	0.8	0.0	148.6					
Hedge End	0.9	2.5	0.0	0.8	3.2	7.9	0.0	2.9	3.7	0.0	0.0	8.8	4.1	63.5	40.0	20.5	7.3	166.1					
Southampton	3.3	2.7	0.0	2.7	6.5	17.8	8.5	3.5	16.7	0.0	0.0	9.0	11.5	55.1	67.5	30.6	16.9	252.2					
Waterlooville	0.0	2.2	0.4	1.0	9.7	144.3	5.1	0.6	0.4	0.0	0.0	7.3	0.7	0.0	0.0	1.5	0.0	173.2					
All other centres/stores	61.7	48.1	19.9	7.8	46.3	6.1	10.3	12.3	18.7	0.0	0.0	9.8	28.3	36.4	41.7	24.8	13.8	385.9					
Total Available Expenditure (from Table 4)	198.6	214.8	48.5	87.7	110.5	360.6	257.8	87.8	362.2	196.2	180.9	178.8	215.4	190.9	341.9	307.1	217.4	3,557.0					

Note:
For each cell, the monetary figure is derived by multiplying the 2021 available comparison goods expenditure in the zone (Table 4) by the adjusted comparison goods market share of the specified centre in that zone (Table 10).
⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 18 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure for Portsmouth District, 2021 (£ million)

Centre	2007 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A [from Table 8 Col.C]	B [from Table 17]	C [see Note ⁽¹⁾]	D [D = B - C]	E [E = D - A]
<u>Within the District</u>					
Portsmouth City Centre	476.3	964.9	96.2	868.8	392.4
Cosham Suburban Centre	11.4	19.2	5.6	13.7	2.3
Fratton Suburban Centre	4.7	7.9	3.7	4.2	-0.5
Gunwharf Quays	66.5	114.3	23.0	91.3	24.8
North End/London Road Suburban Centre	13.0	22.2	11.2	10.9	-2.0
Southsea Town Centre	53.8	92.5	23.0	69.5	15.7
Sub-Total	625.7	1221.1	162.7	1058.4	432.7
Out of Centre Retail Parks	140.6	239.8	32.7	207.1	66.5
All other local centres/stores	5.9	10.2	2.1	8.1	2.2
Total	772.2	1,471.1	197.5	1,273.6	501.3

Note:

⁽¹⁾ We assume that existing comparison goods floorspace at the base year (2007) will achieve real sales productivity gains of 2.20% per annum. This figure is based on the latest published research by EBS (see Appendix 1E). The store productivity gains are applied to the 2007 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 19 : All Comparison Goods Floorspace Need in Portsmouth District, 2021

Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2021 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 18 Col. E]	[From Table 8 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	392.4	206.3	598.7	437.3	161.4	7,770	20,770
Cosham Suburban Centre	2.3	-4.2	-2.0	0.2	-2.2	4,040	-534
Fratton Suburban Centre	-0.5	-5.9	-6.3	0.0	-6.3	3,420	-1,851
Gunwharf Quays	24.8	2.0	26.8	8.4	18.4	8,390	2,195
North End/London Road Suburban Centre	-2.0	-18.5	-20.6	1.0	-21.6	3,420	-6,309
Southsea Town Centre	15.7	-10.8	4.8	0.6	4.2	4,350	977
Sub-Total	432.7	168.8	601.5	447.5	154.0	-	15,247
Out of Centre Retail Parks	66.5	48.8	115.3	36.1	79.2	3,420	23,155
All other local centres/stores	2.2	0.0	2.2	0.0	2.2	3,420	636
Total	501.3	217.6	718.9	483.6	235.3	-	39,038

Notes:

⁽¹⁾ Details of comparison goods commitments are set out in Appendix 2C.

⁽²⁾ The derivation of our sales density estimates are set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 20 : All Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾		All Comparison Goods Turnover																																																																																																																																																																																																																																																																																																																																																																																																																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)																																																																																																																																																																																																																																																																																																																																																																																																																	
<u>Within the District</u>																								Portsmouth City Centre	19.2	32.7	0.8	4.1	21.0	103.4	93.9	27.2	215.3	175.8	123.5	73.9	40.3	10.3	38.0	52.4	47.7	1079.4	10	107.9	1187.3	Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.5	5.9	0.0	0.0	0.0	0.0	0.5	15.5	1.1	0.0	0.0	0.0	0.0	23.6	0	0.0	23.6	Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.6	7.2	0.3	0.1	0.0	0.0	0.0	0.0	0.0	9.7	0	0.0	9.7	Gunwharf Quays	6.1	1.1	0.0	2.3	2.7	6.5	5.5	2.3	38.1	5.8	11.1	5.7	5.0	3.9	1.8	5.5	9.0	112.5	25	28.1	140.6	North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.9	0.0	0.0	22.5	0.0	0.0	0.0	0.0	0.0	0.0	27.1	0	0.0	27.1	Southsea Town Centre	4.2	5.2	0.0	1.6	1.8	2.4	5.1	3.1	42.9	5.8	3.3	13.1	2.9	0.6	4.9	0.0	2.1	99.0	15	14.9	113.9	Out of Centre Retail Parks	0.0	1.3	0.1	0.6	4.1	19.4	21.6	10.2	79.6	46.4	61.1	38.3	8.3	0.0	2.3	0.0	1.0	294.0	0	0.0	294.0	All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.3	0.0	0.0	0.8	1.5	0.0	0.0	0.0	0.0	12.7	0	0.0	12.7	<u>Outside the District</u>																								Chichester	132.8	153.5	33.3	76.3	14.8	22.8	64.9	25.8	8.1	0.0	0.0	11.6	4.6	1.0	4.6	1.1	4.0	559.2				Fareham	0.0	0.0	0.0	0.0	1.3	15.3	5.1	0.0	0.0	0.0	0.0	14.8	153.9	28.3	186.6	205.9	72.6	683.7				Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	2.3	35.6	77.9	116.2				Havant	1.0	2.4	0.4	5.8	7.5	46.5	80.9	12.3	0.7	0.0	0.0	3.3	6.3	0.0	12.4	1.0	0.0	180.4				Hedge End	1.1	3.1	0.0	1.0	3.8	9.5	0.0	3.4	4.5	0.0	0.0	10.8	5.4	78.5	52.5	26.9	8.7	209.3				Southampton	4.1	3.3	0.0	3.2	7.9	21.4	10.2	4.1	20.5	0.0	0.0	11.1	15.1	68.1	88.6	40.1	20.2	317.8				Waterlooville	0.0	2.7	0.5	1.3	11.7	173.6	6.1	0.7	0.5	0.0	0.0	9.0	1.0	0.0	0.0	1.9	0.0	209.0				All other centres/Stores	76.0	59.2	24.5	9.4	55.7	7.3	12.4	14.7	22.9	0.0	0.0	12.0	37.2	45.0	54.7	32.5	16.5	480.0				Total Available Expenditure (from Table 4)	244.4	264.4	59.7	105.5	132.9	434.0	309.5	105.4	445.0	241.0	222.2	219.7	282.7	236.1	448.6	403.0	259.7	4,413.7			
Portsmouth City Centre	19.2	32.7	0.8	4.1	21.0	103.4	93.9	27.2	215.3	175.8	123.5	73.9	40.3	10.3	38.0	52.4	47.7	1079.4	10	107.9	1187.3																																																																																																																																																																																																																																																																																																																																																																																																																
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.5	5.9	0.0	0.0	0.0	0.0	0.5	15.5	1.1	0.0	0.0	0.0	0.0	23.6	0	0.0	23.6																																																																																																																																																																																																																																																																																																																																																																																																																
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.6	7.2	0.3	0.1	0.0	0.0	0.0	0.0	0.0	9.7	0	0.0	9.7																																																																																																																																																																																																																																																																																																																																																																																																																
Gunwharf Quays	6.1	1.1	0.0	2.3	2.7	6.5	5.5	2.3	38.1	5.8	11.1	5.7	5.0	3.9	1.8	5.5	9.0	112.5	25	28.1	140.6																																																																																																																																																																																																																																																																																																																																																																																																																
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.9	0.0	0.0	22.5	0.0	0.0	0.0	0.0	0.0	0.0	27.1	0	0.0	27.1																																																																																																																																																																																																																																																																																																																																																																																																																
Southsea Town Centre	4.2	5.2	0.0	1.6	1.8	2.4	5.1	3.1	42.9	5.8	3.3	13.1	2.9	0.6	4.9	0.0	2.1	99.0	15	14.9	113.9																																																																																																																																																																																																																																																																																																																																																																																																																
Out of Centre Retail Parks	0.0	1.3	0.1	0.6	4.1	19.4	21.6	10.2	79.6	46.4	61.1	38.3	8.3	0.0	2.3	0.0	1.0	294.0	0	0.0	294.0																																																																																																																																																																																																																																																																																																																																																																																																																
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.3	0.0	0.0	0.8	1.5	0.0	0.0	0.0	0.0	12.7	0	0.0	12.7																																																																																																																																																																																																																																																																																																																																																																																																																
<u>Outside the District</u>																								Chichester	132.8	153.5	33.3	76.3	14.8	22.8	64.9	25.8	8.1	0.0	0.0	11.6	4.6	1.0	4.6	1.1	4.0	559.2				Fareham	0.0	0.0	0.0	0.0	1.3	15.3	5.1	0.0	0.0	0.0	0.0	14.8	153.9	28.3	186.6	205.9	72.6	683.7				Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	2.3	35.6	77.9	116.2				Havant	1.0	2.4	0.4	5.8	7.5	46.5	80.9	12.3	0.7	0.0	0.0	3.3	6.3	0.0	12.4	1.0	0.0	180.4				Hedge End	1.1	3.1	0.0	1.0	3.8	9.5	0.0	3.4	4.5	0.0	0.0	10.8	5.4	78.5	52.5	26.9	8.7	209.3				Southampton	4.1	3.3	0.0	3.2	7.9	21.4	10.2	4.1	20.5	0.0	0.0	11.1	15.1	68.1	88.6	40.1	20.2	317.8				Waterlooville	0.0	2.7	0.5	1.3	11.7	173.6	6.1	0.7	0.5	0.0	0.0	9.0	1.0	0.0	0.0	1.9	0.0	209.0				All other centres/Stores	76.0	59.2	24.5	9.4	55.7	7.3	12.4	14.7	22.9	0.0	0.0	12.0	37.2	45.0	54.7	32.5	16.5	480.0				Total Available Expenditure (from Table 4)	244.4	264.4	59.7	105.5	132.9	434.0	309.5	105.4	445.0	241.0	222.2	219.7	282.7	236.1	448.6	403.0	259.7	4,413.7																																																																																																																																																																																																											
Chichester	132.8	153.5	33.3	76.3	14.8	22.8	64.9	25.8	8.1	0.0	0.0	11.6	4.6	1.0	4.6	1.1	4.0	559.2																																																																																																																																																																																																																																																																																																																																																																																																																			
Fareham	0.0	0.0	0.0	0.0	1.3	15.3	5.1	0.0	0.0	0.0	0.0	14.8	153.9	28.3	186.6	205.9	72.6	683.7																																																																																																																																																																																																																																																																																																																																																																																																																			
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	2.3	35.6	77.9	116.2																																																																																																																																																																																																																																																																																																																																																																																																																			
Havant	1.0	2.4	0.4	5.8	7.5	46.5	80.9	12.3	0.7	0.0	0.0	3.3	6.3	0.0	12.4	1.0	0.0	180.4																																																																																																																																																																																																																																																																																																																																																																																																																			
Hedge End	1.1	3.1	0.0	1.0	3.8	9.5	0.0	3.4	4.5	0.0	0.0	10.8	5.4	78.5	52.5	26.9	8.7	209.3																																																																																																																																																																																																																																																																																																																																																																																																																			
Southampton	4.1	3.3	0.0	3.2	7.9	21.4	10.2	4.1	20.5	0.0	0.0	11.1	15.1	68.1	88.6	40.1	20.2	317.8																																																																																																																																																																																																																																																																																																																																																																																																																			
Waterlooville	0.0	2.7	0.5	1.3	11.7	173.6	6.1	0.7	0.5	0.0	0.0	9.0	1.0	0.0	0.0	1.9	0.0	209.0																																																																																																																																																																																																																																																																																																																																																																																																																			
All other centres/Stores	76.0	59.2	24.5	9.4	55.7	7.3	12.4	14.7	22.9	0.0	0.0	12.0	37.2	45.0	54.7	32.5	16.5	480.0																																																																																																																																																																																																																																																																																																																																																																																																																			
Total Available Expenditure (from Table 4)	244.4	264.4	59.7	105.5	132.9	434.0	309.5	105.4	445.0	241.0	222.2	219.7	282.7	236.1	448.6	403.0	259.7	4,413.7																																																																																																																																																																																																																																																																																																																																																																																																																			

Note:
For each cell, the monetary figure is derived by multiplying the 2026 available comparison goods expenditure in the zone (Table 4) by the adjusted comparison goods market share of the specified centre in that zone (Table 10).

⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 21 : Calculation of Potential All Comparison Goods 'Headroom' Expenditure for Portsmouth District, 2026 (£ million)

Centre	2007 Turnover	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2026	Residual Turnover Potential by 2026	Potential Headroom Expenditure by 2026
	A <i>[from Table 8 Col.C]</i>	B <i>[from Table 20]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	476.3	1187.3	138.3	1049.0	572.7
Cosham Suburban Centre	11.4	23.6	8.0	15.6	4.2
Fratton Suburban Centre	4.7	9.7	5.4	4.4	-0.3
Gunwharf Quays	66.5	140.6	33.0	107.5	41.0
North End/London Road Suburban Centre	13.0	27.1	16.1	11.0	-2.0
Southsea Town Centre	53.8	113.9	33.1	80.8	26.9
Sub-Total	625.7	1502.2	234.0	1268.2	642.5
Out of Centre Retail Parks	140.6	294.0	47.0	247.0	106.4
All other local centres/stores	5.9	12.7	3.1	9.5	3.6
Total	772.2	1,808.9	284.1	1,524.8	752.5

Note:

⁽¹⁾ We assume that existing comparison goods floorspace at the base year (2007) will achieve real sales productivity gains of 2.20% per annum. This figure is based on the latest published research by EBS (see Appendix 1E). The store productivity gains are applied to the 2007 benchmark comparison goods turnovers for each centre / retail category as set out in Table 8, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Comparison Goods
SCENARIO 2: INCREASE IN MARKET SHARE OF PORTSMOUTH CITY CENTRE

Table 22 : All Comparison Goods Floorspace Need in Portsmouth District, 2026

Centre	Potential Headroom Expenditure by 2026 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2026 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2026 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 21 Col. E]	[From Table 8 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	572.7	206.3	779.0	487.7	291.3	8,660	33,632
Cosham Suburban Centre	4.2	-4.2	-0.1	0.2	-0.3	4,500	-57
Fratton Suburban Centre	-0.3	-5.9	-6.2	0.0	-6.2	3,810	-1,618
Gunwharf Quays	41.0	2.0	43.1	9.4	33.7	9,360	3,596
North End/London Road Suburban Centre	-2.0	-18.5	-20.5	1.1	-21.6	3,810	-5,678
Southsea Town Centre	26.9	-10.8	16.1	0.7	15.4	4,850	3,174
Sub-Total	642.5	168.8	811.3	499.1	312.2	-	33,048
Out of Centre Retail Parks	106.4	48.8	155.2	40.2	115.0	3,810	30,183
All other local centres/stores	3.6	0.0	3.6	0.0	3.6	3,810	946
Total	752.5	217.6	970.1	539.3	430.8	-	64,177

Notes:

⁽¹⁾ Details of comparison goods commitments are set out in Appendix 2C.

⁽²⁾ The derivation of our sales density estimates are set out in Section 6.

PORTSMOUTH SHOPPING STUDY: UPDATE

On behalf of

PORTSMOUTH CITY COUNCIL

APPENDIX 3

**QUANTITATIVE NEED ASSESSMENT:
CONVENIENCE GOODS**

June 2007

Contents

Table 1	Population Change by Zone
Table 2	Expenditure on Convenience Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)
Table 3	Expenditure on Convenience Goods Per Head of Population By Zone (excluding Expenditure by Special Forms of Trading)
Table 4	Total Available Convenience Goods Expenditure By Zone (excluding Expenditure by Special Forms of Trading)
Table 5	Estimated Centre Market Shares by Zone, 2007 (Column Per Cent)
Table 6	Convenience Goods Retail Expenditure Pattern and Centure Turnover Estimates, 2007 (£million)
Table 7	Adjusted Convenience Goods Market Shares by Zone (Column Per Cent)
Table 8	Convenience Goods Expenditure Pattern and Centure Turnover Estimates, 2011 (£million)
Table 9	Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2011 (£ million)
Table 10	Quantitative Retail Floorspace Need, 2011
Table 11	Convenience Goods Expenditure Pattern and Centure Turnover Estimates, 2016 (£million)
Table 12	Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2016 (£ million)
Table 13	Quantitative Retail Floorspace Need, 2016
Table 14	Convenience Goods Expenditure Pattern and Centure Turnover Estimates, 2021 (£million)
Table 15	Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2021 (£ million)
Table 16	Quantitative Retail Floorspace Need, 2021
Table 17	Convenience Goods Expenditure Pattern and Centure Turnover Estimates, 2026 (£million)
Table 18	Calculation of Potential Convenience Goods 'Headroom' Expenditure, 2026 (£ million)
Table 19	Quantitative Retail Floorspace Need, 2026

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 1: Population Change by Zone

Zone	2005	2007 <small>(Base Year)</small>	2011	2016	2021	2026
Zone 1 - Selsey	37,758	37,903	38,426	39,251	40,093	40,954
Zone 2 - Chichester	38,958	39,512	41,202	42,086	42,990	43,913
Zone 3 - Midhurst	9,649	9,725	9,962	10,176	10,394	10,617
Zone 4 - Southbourne	17,102	17,298	17,869	17,789	17,657	17,634
Zone 5 - Petersfield	21,648	21,636	21,826	21,728	21,567	21,539
Zone 6 - Waterlooville	72,263	72,580	73,856	73,525	72,978	72,885
Zone 7 - Havant	55,127	55,215	55,931	57,690	57,185	56,973
Zone 8 - Hayling Island	17,278	17,133	17,023	17,558	17,405	17,340
Zone 9 - Portsmouth & Southsea	70,169	70,890	72,253	72,472	73,514	74,955
Zone 10 - Fratton	43,751	44,007	44,726	44,862	45,507	46,399
Zone 11 - North End	36,302	36,528	37,225	37,338	37,875	38,617
Zone 12 - Cosham	39,422	39,383	39,709	39,829	40,402	41,194
Zone 13 - Fareham	38,038	38,470	39,059	38,953	42,838	46,645
Zone 14 - Bishops Waltham & Botley	30,866	31,464	32,628	35,042	36,098	37,037
Zone 15 - Locks Heath	55,523	56,795	58,950	58,790	64,653	70,399
Zone 16 - Stubbington	58,682	59,400	60,688	60,523	66,559	72,474
Zone 17 - Gosport	45,438	45,826	46,768	46,001	45,380	44,996
Total (All Zones)	687,974	693,765	708,101	713,613	733,095	754,573

Note:

Population figures by zone for 2005, 2007 (our base year) and 2011 are produced by Experian Business Strategies (EBS). Populations by zone for 2016, 2021 and 2026 are derived by applying the appropriate long-term district-based population projections prepared by Hampshire and West Sussex County Councils to each constituent zone.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 2 : Expenditure on Convenience Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾					
	2005	2007 (Base Year)	2011	2016	2021	2026
Zone 1 - Selsey	1,666	1,683	1,717	1,799	1,863	1,929
Zone 2 - Chichester	1,640	1,656	1,690	1,771	1,834	1,899
Zone 3 - Midhurst	1,622	1,638	1,671	1,751	1,814	1,878
Zone 4 - Southbourne	1,647	1,664	1,697	1,778	1,841	1,907
Zone 5 - Petersfield	1,675	1,692	1,726	1,809	1,873	1,939
Zone 6 - Waterlooville	1,589	1,605	1,637	1,716	1,777	1,840
Zone 7 - Havant	1,551	1,567	1,598	1,675	1,734	1,796
Zone 8 - Hayling Island	1,647	1,664	1,697	1,778	1,841	1,907
Zone 9 - Portsmouth & Southsea	1,565	1,581	1,613	1,690	1,750	1,812
Zone 10 - Fratton	1,438	1,452	1,482	1,553	1,608	1,665
Zone 11 - North End	1,523	1,538	1,569	1,644	1,703	1,763
Zone 12 - Cosham	1,512	1,527	1,558	1,633	1,691	1,751
Zone 13 - Fareham	1,618	1,634	1,667	1,747	1,809	1,873
Zone 14 - Bishops Waltham & Botley	1,672	1,689	1,723	1,805	1,869	1,936
Zone 15 - Locks Heath	1,629	1,645	1,678	1,759	1,821	1,886
Zone 16 - Stubbington	1,505	1,520	1,551	1,625	1,683	1,742
Zone 17 - Gosport	1,516	1,531	1,562	1,637	1,695	1,755

Note:

⁽¹⁾ Average consumer expenditure per head on convenience goods for 2005 has been generated by EBS for each zone (see Appendix 1A). These have been projected forwards to our base year of 2007 and our forecast years of 2011, 2016, 2021 and 2026 by adopting the following EBS expenditure per head forecasts:

2005-2007	0.5% per annum	0.5%
2005-2011	0.5% per annum	0.5%
2005-2016	0.7% per annum	0.7%
2005-2021	0.7% per annum	0.7%
2005-2026	0.7% per annum	0.7%

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 3 : Expenditure on Convenience Goods Per Head of Population By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾					
	2005	2007 (Base Year)	2011	2016	2021	2026
Zone 1 - Selsey	1,618	1,622	1,643	1,722	1,783	1,846
Zone 2 - Chichester	1,592	1,597	1,617	1,695	1,755	1,817
Zone 3 - Midhurst	1,575	1,579	1,599	1,676	1,736	1,797
Zone 4 - Southbourne	1,599	1,604	1,624	1,702	1,762	1,825
Zone 5 - Petersfield	1,626	1,631	1,652	1,731	1,792	1,856
Zone 6 - Waterlooville	1,543	1,547	1,567	1,642	1,700	1,761
Zone 7 - Havant	1,506	1,510	1,529	1,603	1,660	1,718
Zone 8 - Hayling Island	1,599	1,604	1,624	1,702	1,762	1,825
Zone 9 - Portsmouth & Southsea	1,520	1,524	1,543	1,617	1,675	1,734
Zone 10 - Fratton	1,396	1,400	1,418	1,486	1,539	1,593
Zone 11 - North End	1,479	1,483	1,502	1,574	1,630	1,687
Zone 12 - Cosham	1,468	1,472	1,491	1,562	1,618	1,675
Zone 13 - Fareham	1,571	1,575	1,595	1,672	1,731	1,793
Zone 14 - Bishops Waltham & Botley	1,624	1,628	1,649	1,728	1,789	1,853
Zone 15 - Locks Heath	1,582	1,586	1,606	1,683	1,743	1,805
Zone 16 - Stubbington	1,461	1,465	1,484	1,555	1,610	1,668
Zone 17 - Gosport	1,472	1,476	1,495	1,567	1,622	1,680

Note:

⁽¹⁾ Expenditure per head on convenience goods has been discounted by 2.9% and 3.6% (over the figures in Table 2) for 2005 and the base year of 2007 respectively, to exclude non-store retail sales, which includes e-tailing. These are the latest estimates published by EBS. At 2011, we assume a 6.2% reduction over the figures in Table 2, whilst for 2016, 2021 and 2026 we also assume discounts of 4.3% (see Appendix 1D and paragraphs 5.33 to 5.37 in Section 5).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 4 : Total Available Convenience Goods Expenditure By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Total Available Expenditure (£m) ⁽¹⁾				
	Base Year	Forecast Years			
	2007	2011	2016	2021	2026
Zone 1 - Selsey	61.5	63.1	67.6	71.5	75.6
Zone 2 - Chichester	63.1	66.6	71.3	75.4	79.8
Zone 3 - Midhurst	15.4	15.9	17.1	18.0	19.1
Zone 4 - Southbourne	27.7	29.0	30.3	31.1	32.2
Zone 5 - Petersfield	35.3	36.0	37.6	38.7	40.0
Zone 6 - Waterlooville	112.3	115.7	120.7	124.1	128.3
Zone 7 - Havant	83.4	85.5	92.5	94.9	97.9
Zone 8 - Hayling Island	27.5	27.6	29.9	30.7	31.6
Zone 9 - Portsmouth & Southsea	108.0	111.5	117.2	123.1	130.0
Zone 10 - Fratton	61.6	63.4	66.7	70.0	73.9
Zone 11 - North End	54.2	55.9	58.8	61.7	65.2
Zone 12 - Cosham	58.0	59.2	62.2	65.4	69.0
Zone 13 - Fareham	60.6	62.3	65.1	74.2	83.6
Zone 14 - Bishops Waltham & Botley	51.2	53.8	60.5	64.6	68.6
Zone 15 - Locks Heath	90.1	94.7	99.0	112.7	127.1
Zone 16 - Stubbington	87.0	90.1	94.1	107.2	120.9
Zone 17 - Gosport	67.6	69.9	72.1	73.6	75.6
Total (All Zones)	1,064.5	1,100.5	1,162.6	1,236.8	1,318.3

Note:

⁽¹⁾ Expenditure totals are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head on convenience goods after making appropriate reductions for SFT (Table 3).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 5 : Estimated Centre Market Shares by Zone, 2007 (Column Per Cent)

Retail Supply : Where the Money is Spent	Consumer Demand : Where the Money Comes From																
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17
	<i>Selsey</i>	<i>Chichester</i>	<i>Midhurst</i>	<i>Southbourne</i>	<i>Petersfield</i>	<i>Waterlooville</i>	<i>Havant</i>	<i>Hayling Island</i>	<i>Portsmouth & Southsea</i>	<i>Fratton</i>	<i>North End</i>	<i>Cosham</i>	<i>Fareham</i>	<i>Bishops Waltham & Botley</i>	<i>Locks Heath</i>	<i>Stubbington</i>	<i>Gosport</i>
Within the District																	
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2	11.8	44.1	10.7	0.8	1.0	0.0	0.2	0.0	0.0
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	6.6	0.0	0.0	1.1	0.9	1.4	19.3	0.6	0.0	0.6	0.0	0.0
Fratton Suburban Centre	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	27.7	31.7	20.8	2.2	0.0	0.0	0.0	0.2	0.0
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	3.5	29.8	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	8.6	2.8	4.4	12.5	12.2	22.1	60.3	17.2	0.0	1.5	0.1	0.0
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.9	0.0	3.2	19.4	4.1	10.2	1.4	2.6	3.2	0.0	0.0	0.0
Outside the District																	
Chichester	81.5	97.4	33.7	75.5	0.0	0.0	3.4	3.6	0.0	0.5	0.0	0.6	0.0	0.1	0.0	0.0	0.0
Fareham	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.8	63.8	20.2	28.1	65.3	20.9
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	2.1	16.8	74.6
Havant	1.4	0.0	0.0	9.6	0.0	20.7	87.9	52.9	0.6	1.9	0.0	9.6	0.0	0.0	0.0	0.3	0.0
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	46.7	15.4	2.0	0.0
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.4	0.7	0.0
Waterlooville	0.0	0.0	0.0	3.5	1.9	48.6	0.0	7.3	5.0	0.0	3.1	1.1	0.0	0.5	0.0	0.0	0.0
All other centres/Stores	17.1	1.6	66.3	11.4	97.7	14.4	5.9	28.4	9.4	1.1	1.9	3.7	11.2	28.4	51.7	14.6	4.5
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Note:

The market share percentages are derived from the 2004 Portsmouth household telephone survey carried out by Colliers CRE. We assume that shopping patterns will not have changed materially between 2004 and 2007.

Table 6 : Convenience Goods Retail Expenditure Pattern and Centre Turnover Estimates, 2007 (£million)

Retail Supply : Where the Money is Spent	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Convenience Goods Turnover Potential	Convenience Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) ⁽³⁾	Benchmark Convenience Goods Turnover (£m)	Extent of Any Over/Under Trading (£m)		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17									A	B
Within the District																											
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	12.7	27.2	5.8	0.5	0.6	0.0	0.2	0.0	0.0	47.2	0.0	47.2	6,406	7,375	9,000	57.7	-10.4		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	7.4	0.0	0.0	1.2	0.6	0.8	11.2	0.4	0.0	0.5	0.0	0.0	22.0	0.0	22.0	3,210	6,856	7,250	23.3	-1.3		
Fratton Suburban Centre	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	29.9	19.5	11.3	1.3	0.0	0.0	0.0	0.2	0.0	62.8	0.0	62.8	3,645	17,229	9,250	33.7	29.1		
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.1	333	3,244	5,000	1.7	-0.6		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.2	16.1	0.0	0.0	0.0	0.0	0.0	0.0	20.1	0.0	20.1	4,366	4,612	6,500	28.4	-8.2		
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.6	0.0	10.6	2,665	3,972	8,000	21.3	-10.7		
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	9.7	2.3	1.2	13.5	7.5	12.0	35.0	10.4	0.0	1.4	0.1	0.0	93.0	0.0	93.0	8,578	10,843	9,250	79.3	13.7		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.9	21.0	2.5	5.5	0.8	1.6	1.6	0.0	0.0	0.0	34.9	0.0	34.9	-	-	-	34.9	0.0		
Outside the District																											
Chichester	50.1	61.5	5.2	20.9	0.0	0.0	2.8	1.0	0.0	0.3	0.0	0.3	0.0	0.1	0.0	0.0	0.0	142.2									
Fareham	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.5	38.7	10.3	25.3	56.8	14.1	145.9									
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	1.9	14.6	50.5	69.2									
Havant	0.9	0.0	0.0	2.7	0.0	23.2	73.3	14.5	0.6	1.2	0.0	5.6	0.0	0.0	0.3	0.0	122.2										
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	23.9	13.9	1.7	0.0	39.7									
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.6	0.0	1.4										
Waterlooville	0.0	0.0	0.0	1.0	0.7	54.6	0.0	2.0	5.4	0.0	1.7	0.6	0.0	0.3	0.0	0.0	66.2										
All other centres/Stores	10.5	1.0	10.2	3.2	34.5	16.2	4.9	7.8	10.2	0.7	1.0	2.1	6.8	14.5	46.6	12.7	3.0	185.9									
Total Available Expenditure (from Table 4)	61.5	63.1	15.4	27.7	35.3	112.3	83.4	27.5	108.0	61.6	54.2	58.0	60.6	51.2	90.1	87.0	67.6	1,064.5									

Note:

For each cell, the monetary figure is derived by multiplying the 2007 available consumer expenditure in the zone (Table 4) by the 2007 market share of the specified Centre in that zone (Table 5).

⁽¹⁾ Estimated by Colliers CRE.

⁽²⁾ Floorspace based on data supplied by Portsmouth City Council (see Appendix 2A).

⁽³⁾ Colliers CRE estimates.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 7 : Adjusted Convenience Goods Market Shares by Zone (Column Per Cent)

Retail Supply : Where the Money is Spent	Consumer Demand : Where the Money Comes From (Zone)																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
<u>Within the District</u>																	
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2	11.8	44.1	10.7	0.8	1.0	0.0	0.2	0.0	0.0
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	6.6	0.0	0.0	1.1	0.9	1.4	19.3	0.6	0.0	0.6	0.0	0.0
Fratton Suburban Centre	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	27.7	31.7	20.8	2.2	0.0	0.0	0.0	0.2	0.0
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	3.5	29.8	0.0	0.0	0.0	0.0	0.0	0.0
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	8.6	2.8	4.4	12.5	12.2	22.1	60.3	17.2	0.0	1.5	0.1	0.0
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.9	0.0	3.2	19.4	4.1	10.2	1.4	2.6	3.2	0.0	0.0	0.0
<u>Outside the District</u>																	
Chichester	81.5	97.4	33.7	75.5	0.0	0.0	3.4	3.6	0.0	0.5	0.0	0.6	0.0	0.1	0.0	0.0	0.0
Fareham	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.8	63.8	20.2	28.1	65.3	20.9
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	2.1	16.8	74.6
Havant	1.4	0.0	0.0	9.6	0.0	20.7	87.9	52.9	0.6	1.9	0.0	9.6	0.0	0.0	0.0	0.3	0.0
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	46.7	15.4	2.0	0.0
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.4	0.7	0.0
Waterlooville	0.0	0.0	0.0	3.5	1.9	48.6	0.0	7.3	5.0	0.0	3.1	1.1	0.0	0.5	0.0	0.0	0.0
All other centres/Stores	17.1	1.6	66.3	11.4	97.7	14.4	5.9	28.4	9.4	1.1	1.9	3.7	11.2	28.4	51.7	14.6	4.5
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Note:

The market share percentages are the same as those set out in Table 5.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 8 : Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2011 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Convenience Goods Turnover Potential	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17				
<u>Within the District</u>																					
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	13.2	28.0	6.0	0.5	0.6	0.0	0.2	0.0	0.0	48.7	0.0	48.7	
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	7.6	0.0	0.0	1.2	0.6	0.8	11.4	0.4	0.0	0.6	0.0	0.0	22.6	0.0	22.6	
Fratton Suburban Centre	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	30.9	20.1	11.6	1.3	0.0	0.0	0.0	0.2	0.0	64.8	0.0	64.8	
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.1	
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	2.2	16.7	0.0	0.0	0.0	0.0	0.0	0.0	20.8	0.0	20.8	
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.9	0.0	10.9	
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	10.0	2.4	1.2	13.9	7.7	12.4	35.7	10.7	0.0	1.4	0.1	0.0	95.5	0.0	95.5	
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.9	21.6	2.6	5.7	0.8	1.6	1.7	0.0	0.0	0.0	36.0	0.0	36.0	
<u>Outside the District</u>																					
Chichester	51.4	64.9	5.4	21.9	0.0	0.0	2.9	1.0	0.0	0.3	0.0	0.4	0.0	0.1	0.0	0.0	0.0	148.3			
Fareham	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.5	39.8	10.9	26.6	58.8	14.6	151.3			
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	2.0	15.1	52.2	71.5			
Havant	0.9	0.0	0.0	2.8	0.0	24.0	75.2	14.6	0.7	1.2	0.0	5.7	0.0	0.0	0.0	0.3	0.0	125.3			
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	25.1	14.6	1.8	0.0	41.6			
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.6	0.0	1.5			
Waterlooville	0.0	0.0	0.0	1.0	0.7	56.2	0.0	2.0	5.6	0.0	1.7	0.7	0.0	0.3	0.0	0.0	0.0	68.2			
All other centres/Stores	10.8	1.1	10.6	3.3	35.2	16.7	5.0	7.9	10.5	0.7	1.1	2.2	7.0	15.3	49.0	13.1	3.1	192.5			
Total Available Expenditure (from Table 4)	63.1	66.6	15.9	29.0	36.0	115.7	85.5	27.6	111.5	63.4	55.9	59.2	62.3	53.8	94.7	90.1	69.9	1,100.5			

Note:
For each cell, the monetary figure is derived by multiplying the 2011 available convenience goods expenditure in the zone (Table 4) by the convenience goods market share of the specified centre in that zone (Table 7).

⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 9 : Calculation of Potential Convenience Goods 'Headroom' Expenditure for Portsmouth District, 2011 (£ million)

Centre	2007 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A <i>[from Table 6 Col.C]</i>	B <i>[from Table 8]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	47.2	48.7	1.4	47.3	0.0
Cosham Suburban Centre	22.0	22.6	0.6	22.0	0.0
Fratton Suburban Centre	62.8	64.8	0.8	64.0	1.1
Gunwharf	1.1	1.1	0.0	1.1	0.0
North End/London Road Suburban Centre	20.1	20.8	0.7	20.1	0.0
Southsea Town Centre	10.6	10.9	0.5	10.4	-0.2
Sub-Total	163.9	168.8	4.0	164.8	1.0
Major Out of Centre Superstores	93.0	95.5	1.9	93.6	0.6
All other local centres/stores	34.9	36.0	0.8	35.2	0.3
Total	291.8	300.4	6.8	293.6	1.8

Note:

We assume that existing convenience goods floorspace at the base year (2007) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on the latest published research by EBS (Appendix 1E). The store productivity gains are applied to the 2007 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 10 : Quantitative Retail Floorspace Need in Portsmouth District, 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2011 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 9 Col. E]	[From Table 6 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	0.0	-10.4	-10.4	0.0	-10.4	8,000	-1,296
Cosham Suburban Centre	0.0	-1.3	-1.3	0.0	-1.3	8,000	-156
Fratton Suburban Centre	1.1	29.1	30.2	0.0	30.2	8,000	3,779
Gunwharf	0.0	-0.6	-0.6	0.0	-0.6	8,000	-74
North End/London Road Suburban Centre	0.0	-8.2	-8.3	0.0	-8.3	8,000	-1,036
Southsea Town Centre	-0.2	-10.7	-10.9	0.0	-10.9	8,000	-1,364
Sub-Total	1.0	-2.2	-1.2	0.0	-1.2	-	-147
Major Out of Centre Superstores	0.6	13.7	14.3	1.2	13.1	8,000	1,632
All other local centres/stores	0.3	0.0	0.3	0.0	0.3	8,000	33
Total	1.8	11.5	13.3	1.2	12.1	-	1,517

Notes:

⁽¹⁾ Floorspace and estimated turnovers of convenience goods commitments are set out in Appendix 2C.

⁽²⁾ We assume an average sales density of £8,000 per sq m. The derivation of this estimate is set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 11 : Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Convenience Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17					
<u>Within the District</u>																						
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	13.8	29.4	6.3	0.5	0.7	0.0	0.2	0.0	0.0	51.2	0.0	51.2		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	8.0	0.0	0.0	1.3	0.6	0.8	12.0	0.4	0.0	0.6	0.0	0.0	23.7	0.0	23.7		
Fratton Suburban Centre	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	32.5	21.1	12.2	1.4	0.0	0.0	0.0	0.2	0.0	68.1	0.0	68.1		
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	1.2		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.3	17.5	0.0	0.0	0.0	0.0	0.0	0.0	21.8	0.0	21.8		
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.5	0.0	11.5		
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	10.4	2.6	1.3	14.6	8.1	13.0	37.5	11.2	0.0	1.5	0.1	0.0	100.4	0.0	100.4		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.0	22.7	2.7	6.0	0.9	1.7	1.9	0.0	0.0	0.0	38.0	0.0	38.0		
<u>Outside the District</u>																						
Chichester	55.1	69.5	5.7	22.9	0.0	0.0	3.1	1.1	0.0	0.3	0.0	0.4	0.0	0.1	0.0	0.0	0.0	158.1				
Fareham	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5	41.6	12.2	27.8	61.5	15.1	158.8				
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	2.1	15.8	53.8	74.0				
Havant	0.9	0.0	0.0	2.9	0.0	25.0	81.3	15.8	0.7	1.3	0.0	6.0	0.0	0.0	0.0	0.3	0.0	134.1				
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	28.3	15.2	1.9	0.0	45.5				
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.7	0.0	1.6				
Waterlooville	0.0	0.0	0.0	1.1	0.7	58.7	0.0	2.2	5.9	0.0	1.8	0.7	0.0	0.3	0.0	0.0	0.0	71.3				
All other centres/Stores	11.6	1.1	11.3	3.5	36.7	17.4	5.5	8.5	11.0	0.7	1.1	2.3	7.3	17.2	51.2	13.7	3.2	203.3				
Total Available Expenditure (from Table 4)	67.6	71.3	17.1	30.3	37.6	120.7	92.5	29.9	117.2	66.7	58.8	62.2	65.1	60.5	99.0	94.1	72.1	1,162.6				

Note:
For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (Table 4) by the convenience goods market share of the specified centre in that zone (Table 7).

⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 12 : Calculation of Potential Convenience Goods 'Headroom' Expenditure for Portsmouth District, 2016 (£ million)

Centre	2007 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A <i>[from Table 6 Col.C]</i>	B <i>[from Table 11]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	47.2	51.2	3.2	48.0	0.7
Cosham Suburban Centre	22.0	23.7	1.3	22.4	0.4
Fratton Suburban Centre	62.8	68.1	1.9	66.2	3.4
Gunwharf	1.1	1.2	0.1	1.1	0.0
North End/London Road Suburban Centre	20.1	21.8	1.6	20.3	0.1
Southsea Town Centre	10.6	11.5	1.2	10.3	-0.3
Sub-Total	163.9	177.4	9.2	168.2	4.4
Major Out of Centre Superstores	93.0	100.4	4.4	96.0	3.0
All other local centres/stores	34.9	38.0	1.9	36.1	1.2
Total	291.8	315.8	15.5	300.3	8.5

Note:

We assume that existing convenience goods floorspace at the base year (2007) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on the latest published research by EBS (Appendix 1E). The store productivity gains are applied to the 2007 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 13 : Quantitative Retail Floorspace Need in Portsmouth District, 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2016 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 12 Col. E]	[From Table 6 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	0.7	-10.4	-9.7	0.0	-9.7	8,243	-1,174
Cosham Suburban Centre	0.4	-1.3	-0.9	0.0	-0.9	8,243	-107
Fratton Suburban Centre	3.4	29.1	32.5	0.0	32.5	8,243	3,944
Gunwharf	0.0	-0.6	-0.6	0.0	-0.6	8,243	-71
North End/London Road Suburban Centre	0.1	-8.2	-8.1	0.0	-8.1	8,243	-984
Southsea Town Centre	-0.3	-10.7	-11.0	0.0	-11.0	8,243	-1,336
Sub- Total	4.4	-2.2	2.2	0.0	2.2	-	270
Major Out of Centre Superstores	3.0	13.7	16.6	1.3	15.3	8,243	1,859
All other local centres/stores	1.2	0.0	1.2	0.0	1.2	8,243	140
Total	8.5	11.5	20.0	1.3	18.7	-	2,269

Notes:

⁽¹⁾ Floorspace and estimated turnovers of convenience goods commitments are set out in Appendix 2C.

⁽²⁾ We assume an average sales density of £8,243 per sq m. The derivation of this estimate is set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 14 : Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Convenience Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17					
<u>Within the District</u>																						
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	14.5	30.9	6.6	0.5	0.7	0.0	0.2	0.0	0.0	53.8	0.0	53.8		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	8.2	0.0	0.0	1.4	0.6	0.9	12.6	0.4	0.0	0.7	0.0	0.0	24.8	0.0	24.8		
Fratton Suburban Centre	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	34.1	22.2	12.8	1.4	0.0	0.0	0.0	0.2	0.0	71.5	0.0	71.5		
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	1.2		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	2.5	18.4	0.0	0.0	0.0	0.0	0.0	0.0	22.9	0.0	22.9		
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.1	0.0	12.1		
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	10.7	2.7	1.3	15.4	8.5	13.6	39.4	12.8	0.0	1.7	0.1	0.0	106.2	0.0	106.2		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.0	23.9	2.9	6.3	0.9	1.9	2.1	0.0	0.0	0.0	40.1	0.0	40.1		
<u>Outside the District</u>																						
Chichester	58.2	73.5	6.1	23.5	0.0	0.0	3.2	1.1	0.0	0.4	0.0	0.4	0.0	0.1	0.0	0.0	0.0	166.4				
Fareham	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5	47.3	13.0	31.7	70.0	15.4	178.1				
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	2.4	18.0	54.9	78.0				
Havant	1.0	0.0	0.0	3.0	0.0	25.7	83.4	16.2	0.7	1.3	0.0	6.3	0.0	0.0	0.0	0.3	0.0	138.0				
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	30.2	17.4	2.1	0.0	49.8				
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.8	0.0	1.8				
Waterlooville	0.0	0.0	0.0	1.1	0.7	60.3	0.0	2.2	6.2	0.0	1.9	0.7	0.0	0.3	0.0	0.0	0.0	73.5				
All other centres/Stores	12.2	1.2	12.0	3.5	37.8	17.9	5.6	8.7	11.6	0.8	1.2	2.4	8.3	18.3	58.3	15.6	3.3	218.7				
Total Available Expenditure (from Table 4)	71.5	75.4	18.0	31.1	38.7	124.1	94.9	30.7	123.1	70.0	61.7	65.4	74.2	64.6	112.7	107.2	73.6	1,236.8				

Note:
For each cell, the monetary figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (Table 4) by the convenience goods market share of the specified centre in that zone (Table 7).

⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 15 : Calculation of Potential Convenience Goods 'Headroom' Expenditure for Portsmouth District, 2021 (£ million)

Centre	2007 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A <i>[from Table 6 Col.C]</i>	B <i>[from Table 14]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	47.2	53.8	5.0	48.8	1.5
Cosham Suburban Centre	22.0	24.8	2.0	22.7	0.7
Fratton Suburban Centre	62.8	71.5	2.9	68.6	5.8
Gunwharf	1.1	1.2	0.1	1.1	0.0
North End/London Road Suburban Centre	20.1	22.9	2.5	20.5	0.3
Southsea Town Centre	10.6	12.1	1.9	10.2	-0.4
Sub-Total	163.9	186.4	14.5	171.9	8.0
Major Out of Centre Superstores	93.0	106.2	6.9	99.3	6.3
All other local centres/stores	34.9	40.1	3.1	37.0	2.1
Total	291.8	332.6	24.5	308.1	16.4

Note:

We assume that existing convenience goods floorspace at the base year (2007) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on the latest published research by EBS (Appendix 1E). The store productivity gains are applied to the 2007 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 16 : Quantitative Retail Floorspace Need in Portsmouth District, 2021

Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2021 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 15 Col. E]	[From Table 6 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	1.5	-10.4	-8.9	0.0	-8.9	8,493	-1,046
Cosham Suburban Centre	0.7	-1.3	-0.5	0.0	-0.5	8,493	-63
Fratton Suburban Centre	5.8	29.1	34.9	0.0	34.9	8,493	4,107
Gunwharf	0.0	-0.6	-0.6	0.0	-0.6	8,493	-68
North End/London Road Suburban Centre	0.3	-8.2	-7.9	0.0	-7.9	8,493	-933
Southsea Town Centre	-0.4	-10.7	-11.1	0.0	-11.1	8,493	-1,309
Sub- Total	8.0	-2.2	5.8	0.0	5.8	-	688
Major Out of Centre Superstores	6.3	13.7	19.9	1.3	18.6	8,493	2,195
All other local centres/stores	2.1	0.0	2.1	0.0	2.1	8,493	245
Total	16.4	11.5	27.9	1.3	26.6	-	3,128

Notes:

⁽¹⁾ Floorspace and estimated turnovers of convenience goods commitments are set out in Appendix 2C.

⁽²⁾ We assume an average sales density of £8,493 per sq m. The derivation of this estimate is set out in Section 6.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 17 : Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£million)

Centre	Zone																	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Convenience Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17					
<u>Within the District</u>																						
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.1	15.3	32.6	7.0	0.6	0.8	0.0	0.3	0.0	0.0	56.9	0.0	56.9		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	8.5	0.0	0.0	1.4	0.7	0.9	13.3	0.5	0.0	0.8	0.0	0.0	26.1	0.0	26.1		
Fratton Suburban Centre	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	36.0	23.4	13.6	1.5	0.0	0.0	0.0	0.2	0.0	75.5	0.0	75.5		
Gunwharf	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	1.3		
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	2.6	19.4	0.0	0.0	0.0	0.0	0.0	0.0	24.2	0.0	24.2		
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.7	0.0	12.7		
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	11.0	2.7	1.4	16.2	9.0	14.4	41.6	14.4	0.0	1.9	0.1	0.0	112.9	0.0	112.9		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.2	0.0	1.0	25.2	3.0	6.6	1.0	2.2	2.2	0.0	0.0	0.0	42.4	0.0	42.4		
<u>Outside the District</u>																						
Chichester	61.6	77.7	6.4	24.3	0.0	0.0	3.3	1.1	0.0	0.4	0.0	0.4	0.0	0.1	0.0	0.0	0.0	175.4				
Fareham	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.6	53.3	13.9	35.7	78.9	15.8	198.3				
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	2.7	20.3	56.4	82.4				
Havant	1.1	0.0	0.0	3.1	0.0	26.6	86.1	16.7	0.8	1.4	0.0	6.6	0.0	0.0	0.0	0.4	0.0	142.7				
Hedge End	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	32.0	19.6	2.4	0.0	54.2				
Southampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.8	0.0	2.0				
Waterlooville	0.0	0.0	0.0	1.1	0.8	62.4	0.0	2.3	6.5	0.0	2.0	0.8	0.0	0.3	0.0	0.0	0.0	76.2				
All other centres/Stores	12.9	1.3	12.7	3.7	39.1	18.5	5.8	9.0	12.2	0.8	1.2	2.6	9.4	19.5	65.7	17.6	3.4	235.2				
Total Available Expenditure (from Table 4)	75.6	79.8	19.1	32.2	40.0	128.3	97.9	31.6	130.0	73.9	65.2	69.0	83.6	68.6	127.1	120.9	75.6	1,318.3				

Note:
For each cell, the monetary figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (Table 4) by the convenience goods market share of the specified centre in that zone (Table 7).

⁽¹⁾ We assume that in-flow expenditure as a proportion of expenditure drawn from the survey area remains the same as in the base year (2007).

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 18 : Calculation of Potential Convenience Goods 'Headroom' Expenditure for Portsmouth District, 2026 (£ million)

Centre	2007 Turnover	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2007-2026	Residual Turnover Potential by 2026	Potential Headroom Expenditure by 2026
	A <i>[from Table 6 Col.C]</i>	B <i>[from Table 17]</i>	C <i>[see Note ⁽¹⁾]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	47.2	56.9	6.9	49.9	2.7
Cosham Suburban Centre	22.0	26.1	2.8	23.3	1.3
Fratton Suburban Centre	62.8	75.5	4.1	71.5	8.7
Gunwharf	1.1	1.3	0.2	1.1	0.0
North End/London Road Suburban Centre	20.1	24.2	3.4	20.8	0.7
Southsea Town Centre	10.6	12.7	2.6	10.2	-0.4
Sub-Total	163.9	196.7	20.0	176.8	12.9
Major Out of Centre Superstores	93.0	112.9	9.6	103.3	10.3
All other local centres/stores	34.9	42.4	4.2	38.2	3.3
Total	291.8	352.0	33.7	318.3	26.5

Note:

We assume that existing convenience goods floorspace at the base year (2007) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on the latest published research by EBS (Appendix 1E). The store productivity gains are applied to the 2007 benchmark convenience goods turnover for each centre / retail category as set out in Table 6, Column G.

PORTSMOUTH RETAIL STUDY
Quantitative Need Assessment : Convenience Goods

Table 19 : Quantitative Retail Floorspace Need in Portsmouth District, 2026

Centre	Potential Headroom Expenditure by 2026 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2026 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments ⁽¹⁾ (£m)	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2026 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 18 Col. E]	[From Table 6 Col. H]	[C = A + B]		[E = C - D]		[G = E / F]
<u>Within the District</u>							
Portsmouth City Centre	2.7	-10.4	-7.7	0.0	-7.7	8,751	-882
Cosham Suburban Centre	1.3	-1.3	0.0	0.0	0.0	8,751	-2
Fratton Suburban Centre	8.7	29.1	37.8	0.0	37.8	8,751	4,317
Gunwharf	0.0	-0.6	-0.6	0.0	-0.6	8,751	-65
North End/London Road Suburban Centre	0.7	-8.2	-7.6	0.0	-7.6	8,751	-866
Southsea Town Centre	-0.4	-10.7	-11.1	0.0	-11.1	8,751	-1,274
Sub- Total	12.9	-2.2	10.7	0.0	10.7	-	1,228
Major Out of Centre Superstores	10.3	13.7	24.0	1.4	22.6	8,751	2,578
All other local centres/stores	3.3	0.0	3.3	0.0	3.3	8,751	373
Total	26.5	11.5	38.0	1.4	36.6	-	4,179.5

Notes:

⁽¹⁾ Floorspace and estimated turnovers of convenience goods commitments are set out in Appendix 2C.

⁽²⁾ We assume an average sales density of £8,751 per sq m. The derivation of this estimate is set out in Section 6.