

**PORTSMOUTH SHOPPING STUDY: UPDATE**

**On behalf of**

**PORTSMOUTH CITY COUNCIL**

**Volume 2:**

**Quantitative Retail  
Floorspace Need  
Assessment**

**June 2007**

## QUANTITATIVE RETAIL FLOORSPACE NEED ASSESSMENT

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**PORTSMOUTH SHOPPING STUDY: UPDATE**

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**APPENDIX 1A**

**METHODOLOGY FOR ASSESSING  
QUANTITATIVE RETAIL  
NEED/CAPACITY**

**June 2007**

### Methodology for Assessing Quantitative Retail Need / Capacity

#### **Step 1 Catchment Area Definition and Study Time Frame**

**Step 1A** The catchment (or survey) area should be defined with regard to the study objective.

**Step 1B** The catchment should then be subdivided into zones (or sub-areas) to reflect the number and location of retail centres and the accessibility between them.

The number of zones will depend on the size of the sample for the household survey. Ideally a minimum of around 80-90 interviews should be carried out within each zone.

Zone boundaries are normally defined in terms of ward boundaries or postal geography.

**Step 1C** An assessment will normally adopt the current year as its starting point or “base year”. The end year, or “forecast year”, will normally be determined by the end date of the Plan.

In preparing quantitative need studies it is normally helpful to also produce need estimates for selected intermediate years, since this will show how floorspace need (if any) changes or grows over time.

**Step 1D** A constant price base must be adopted for the quantitative need assessment. Thus all monetary figures are given in real values and discounted for the affects of price inflation.

#### **Step 2 Analyse Consumer Demand**

**Step 2A** Population estimates for each zone at the base year are required. Each of the zone populations must then be projected forwards to the forecast year(s).

**Step 2B** Estimates of retail expenditure per head are required for either the catchment area as a whole or ideally for each zone.

Estimates are also likely to be required for different categories of goods; the most common are: convenience goods and comparison goods.

All expenditure data providers produce estimates for user defined areas which reflect the socio-demographics and affluence of the localities.

It is essential that the expenditure per head estimates are adjusted to the correct price base (see Step 1D) and also that spending on special forms of trading is excluded (i.e. this is expenditure that does not take place in shops e.g. that through mail order, through vending machines and also over the internet).

#### **Step 2C Projection of Expenditure Per Head Estimates Through to the Forecast Year(s)**

National expenditure growth forecasts are published by a number of organisations (e.g. EBS).

**Step 2D** Total available retail expenditure (for each goods category) should be calculated for the survey area and the constituent zones at both the base year and the forecast year(s). Thus the “growth” in available expenditure can be identified.

Total available expenditure at any particular year will originate from two sources:- inside the survey area and from outside the survey area.

Within the survey area – generated expenditure is calculated by multiplying the resident population by the estimate of average spend per head. This calculation can also be undertaken for each zone.

Outside the survey area – it is likely that there will be an in-flow of retail expenditure from people living outside the survey area. This is likely to be particularly significant if the survey area contains higher order centres and/or a popular tourist centre. The main types of in-flow are as follows:-

- Long distance shopping trips – the amount of spending from this source can be determined from household surveys carried out in adjoining areas or should be estimated by reference to the best available sources.
- Workers – a large daily working population will generate retail expenditure. For major commuter areas the spending produced by workers who live outside the survey area should be estimated and included.
- Tourists – visitors from the UK and overseas may for certain locations be an important generator of retail expenditure. Using survey data where available the spending from this source must also be estimated and included.

Estimates must be made of the extent to which the scale of in-flow retail expenditure will change through to the forecast year(s) in real terms.

#### **Step 3 Analyse Retail Supply**

**Step 3A** The existing stock of retail floorspace in the Plan area must be determined by the main goods categories analysed at Step 2B. This is essential since it is virtually impossible to provide a robust estimate of future quantitative need if the current floorspace supply is unknown.

All retail floorspace must be included – in centre, edge of centre and out-of-centre.

If existing stock figures are unavailable, it will normally be necessary to undertake or commission a thorough retail audit of the current retail provision.

As well as estimates of floorspace quantity, a survey of retail occupiers should ideally be carried out. This will ascertain information on the quality of the retail offer, the physical condition of the floorspace stock (e.g. size and configuration of units) and the trading performance of the shops.

The combination of comprehensive information on both the quantity and quality of the existing retail offer / floorspace stock will inform the assessment of whether the retail economy is currently trading at equilibrium or not (see Step 4A below).

**Step 3B** A household survey should be commissioned to establish the existing pattern of shopper behaviour and retail consumer expenditure flows within the Plan area and between the Plan area and adjoining areas.

This survey as a minimum should cover the whole of the Plan area. However, there are important benefits if the survey can be extended to cover other adjoining and nearby areas (i.e. it can then inform on the extent of in-flow expenditure from beyond the Plan area).

The most cost-effective form of household survey is by telephone. As stated at Step 1B, a minimum of 80-90 completed interviews per zone is recommended.

The survey should quantify shopper behaviour separately for the main goods categories.

**Step 3C** The household survey results can then be applied to the totals of available expenditure by zone (from Step 2D) in order to estimate the existing retail turnovers of centres and stores within the Plan area.

For centres which attract long distance shopping trips and/or which benefit from commuter and tourist expenditure (see Step 2D), allowances must be made for turnover contributions from these sources.

The actual centre and store turnovers derived from the household survey should, wherever possible, be cross-checked against actual turnover figures from other sources (e.g. the retailers themselves) where these are available.

The household survey will determine the actual levels of available retail expenditure retained by individual centres and the Plan area as a whole. These are the base year market shares and can be calculated for each main category of goods.

**Step 3D** A “benchmark” turnover for each of the main goods categories must be derived for the Plan area as a whole and for each centre. When compared to the actual turnovers calculated at Step 3C, this allows one to determine whether the existing floorspace is under or over-trading.

The best way to identify whether the existing floorspace is over or under-trading is to carry out a survey of the retailers themselves.

If this is not possible, then published company average sales densities for leading retailers may be used, although this will only give a partial view. In any event, company averages should be weighted up or down as appropriate to reflect local circumstances (e.g. the affluence of the area, the type and size of stores and the costs of the location to retailers).

#### **Step 4 Retail Demand vs. Retail Supply in the Base Year**

**Step 4A** It is necessary to test the adequacy of existing retail provision in the Plan area. If actual turnovers (from Step 3C) exceed the benchmark turnovers (from Step 3D) then it can be said that the current floorspace stock is over-trading, and that there is an existing need for additional floorspace. Conversely, if actual turnovers are less than the benchmark turnovers then there is an existing over-supply of floorspace. Lastly, if actual and benchmark turnovers are the same (or close) then the Plan area’s retail economy for that category of goods can be said to be in equilibrium.

The extent of the existing retail floorspace over or under-supply can be estimated by converting the existing turnover surplus or deficit into floorspace by applying an appropriate average sales density.

#### **Step 5 Changes in Retail Demand and Retail Supply through to the Forecast Year(s)**

**Step 5A** Step 2D estimated the total available retail expenditure within the Plan area at the forecast year(s) for each of the main goods categories. The base year market shares (from Step 3C) may then be applied in order to obtain estimates of the levels of retained available expenditure at the forecast year(s).

It should be considered whether the application of the base year market shares are appropriate at the forecast year(s) in relation to the Plan area as a whole and/or individual centres. If it is considered that expenditure outflow (or leakage) is too high, or a centre is not achieving its true retailing potential, then a case could be made for increasing the market share(s). Alternatively, if it is thought that the proportion of expenditure being retained is too high, then the market share(s) could be reduced.

In either situation, the adjustment of the market shares should be the result of an interactive process, which focuses on realistic expectations of trade retention within individual zones within the Plan area.

It should also be borne in mind that adjusting the market share of a centre will have direct implications for the market shares of other centres. Similarly, increasing the market share for the Plan area as a whole will mean adjoining areas will lose their share of available expenditure. This will require collaboration and agreement with nearby Planning Authorities otherwise double counting of available expenditure is likely.

**Step 5B** Step 3D estimated the benchmark retail turnovers generated within the Plan area in the base year for the main categories of goods. These turnovers must then be projected to the forecast (year(s)) by taking into account any expected improvements in store efficiency (i.e. sales densities). In addition, the turnovers of any retail commitments (normally taken as comprising floorspace under construction or with planning consent) within the Plan area, must be added. It may also be appropriate to take into account the turnover associated with retail proposals and / or the re-use of vacant space.

**Step 5C** The monetary difference between the total potential retained expenditure at 5A and the forecast retail turnover at 5B gives a measure of the quantitative need for additional retail floorspace within the Plan area since the base year. If there is an expenditure surplus this is converted into a floorspace total by dividing through by an appropriate average sales density. Similarly, if there is an expenditure deficit, a floorspace over-supply can be calculated in the same way.

**Step 5D** To arrive at a final estimate of overall quantitative need the floorspace outputs from Step 5C must be combined with the existing floorspace over / under supply figures derived at Step 4A.

**PORTSMOUTH SHOPPING STUDY: UPDATE**

**On behalf of**

**PORTSMOUTH CITY COUNCIL**

**APPENDIX 2A**

**QUANTITATIVE NEED ASSESSMENT:  
COMPARISON GOODS  
SCENARIO 1**

**June 2007**

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**  
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**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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
<b>Total (All Zones)</b>	<b>687,974</b>	<b>693,765</b>	<b>708,101</b>	<b>713,613</b>	<b>733,095</b>	<b>754,573</b>

**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 1: CONSTANT MARKET SHARES**

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

Zone	Expenditure Per Head (£) <sup>(1)</sup>					
	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:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

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

Zone	Expenditure Per Head (£) <sup>(1)</sup>					
	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:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

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

Zone	Total Available Expenditure (£m) <sup>(1)</sup>				
	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
<b>Total (All Zones)</b>	<b>2,038.5</b>	<b>2,433.6</b>	<b>2,871.8</b>	<b>3,557.0</b>	<b>4,413.7</b>

Note:

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup> (£m)	Bulky Comparison Goods <sup>(1)</sup> (£m)	Total Comparison Goods <sup>(2)</sup> (£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
<b>Total (All Zones)</b>	<b>1,392.7</b>	<b>645.8</b>	<b>2,038.5</b>

**Notes:**

<sup>(1)</sup> 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).

<sup>(2)</sup> Figures derived from Table 4.

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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
<b><u>Within the District</u></b>																	
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
<b><u>Outside the District</u></b>																	
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
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

**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.

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**SCENARIO 1: CONSTANT MARKET SHARES**

**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
<b><u>Within the District</u></b>																	
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
<b><u>Outside the District</u></b>																	
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
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

**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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		Total Comparison Goods Turnover Potential
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		A	(%)	
																		A	B		C=A+B
<b><u>Within the District</u></b>																					
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
<b><u>Outside the District</u></b>																					
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			
<b>Total Available Expenditure (from Table 5, Col. A)</b>	<b>76.4</b>	<b>81.7</b>	<b>18.7</b>	<b>35.3</b>	<b>45.9</b>	<b>147.8</b>	<b>103.5</b>	<b>35.2</b>	<b>148.4</b>	<b>79.0</b>	<b>72.1</b>	<b>72.3</b>	<b>79.5</b>	<b>68.9</b>	<b>124.0</b>	<b>113.0</b>	<b>90.9</b>	<b>1,392.7</b>			

**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).

<sup>(1)</sup> Estimated by Colliers CRE.

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		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	
<b>Within the District</b>																					
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
<b>Outside the District</b>																					
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			
<b>Total Available Expenditure (from Table 5, Col. B)</b>	<b>37.4</b>	<b>37.9</b>	<b>8.8</b>	<b>16.8</b>	<b>21.3</b>	<b>69.8</b>	<b>47.4</b>	<b>17.1</b>	<b>63.3</b>	<b>36.0</b>	<b>33.6</b>	<b>33.4</b>	<b>37.8</b>	<b>32.0</b>	<b>58.1</b>	<b>53.0</b>	<b>42.2</b>	<b>645.8</b>			

**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).  
<sup>(1)</sup> Estimated by Colliers CRE.



PORTSMOUTH RETAIL STUDY  
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SCENARIO 1: CONSTANT MARKET SHARES

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 <sup>(1)</sup>	Total Comparison Goods Turnover Potential	Comparison Goods Floorspace (sq.m. net) <sup>(2)</sup>	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) <sup>(3)</sup>	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
<b>Within the District</b>																											
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		
<b>Outside the District</b>																											
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									
<b>Total Available Expenditure (from Table 5, Col. C)</b>	<b>113.8</b>	<b>119.7</b>	<b>27.5</b>	<b>52.1</b>	<b>67.2</b>	<b>217.4</b>	<b>150.9</b>	<b>52.4</b>	<b>211.7</b>	<b>115.0</b>	<b>105.7</b>	<b>105.7</b>	<b>117.3</b>	<b>100.9</b>	<b>182.1</b>	<b>166.2</b>	<b>133.1</b>	<b>2,038.5</b>									

Note:

This table is calculated by adding together Tables 7a and 7b.

<sup>(1)</sup> Derived from adding together Table 7a (Col. B) and Table 7b (Col. B).

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

<sup>(3)</sup> Colliers CRE estimates.

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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
<b><u>Within the District</u></b>																	
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
<b><u>Outside the District</u></b>																	
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
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Note:**

Market shares are derived from figures in Table 8.

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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
<b><u>Within the District</u></b>																	
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
<b><u>Outside the District</u></b>																	
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
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Note:**

The market share percentages are the same as those set out in Table 9.

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<b><u>Within the District</u></b>																							
Portsmouth City Centre	9.0	15.3	0.4	2.1	10.6	52.2	46.0	13.3	101.8	86.7	59.3	35.0	16.8	4.5	15.9	21.9	24.7	515.4	10	51.5	566.9		
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		
<b><u>Outside the District</u></b>																							
Chichester	74.9	87.5	18.5	45.8	8.8	14.6	41.5	16.5	5.6	1.5	1.7	7.6	2.3	0.5	2.3	0.5	2.4	332.5					
Fareham	0.0	0.0	0.0	0.0	0.8	9.1	2.9	0.0	0.0	0.8	0.0	10.8	77.9	14.7	94.7	105.4	46.6	363.6					
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	0.2	1.1	17.5	49.9	68.9					
Havant	0.5	1.3	0.2	3.4	4.5	30.1	51.0	7.1	0.4	0.0	0.0	1.9	3.1	0.0	6.1	0.5	0.0	110.1					
Hedge End	0.6	1.7	0.0	0.6	2.3	5.7	0.0	2.0	2.6	0.7	0.8	6.1	2.6	41.4	25.8	13.3	5.3	111.4					
Southampton	2.2	1.8	0.0	1.9	4.7	12.7	5.9	2.4	20.7	4.5	2.4	8.3	7.4	35.3	43.6	19.8	12.4	186.0					
Waterlooville	0.0	1.5	0.3	0.7	7.0	109.5	3.5	0.4	0.3	0.3	0.5	5.1	0.5	0.0	0.0	0.9	0.0	130.6					
All other centres/stores	41.9	32.7	13.5	5.7	35.2	4.6	7.2	9.4	23.3	5.1	5.3	8.1	19.3	23.5	27.0	15.8	10.1	287.6					
<b>Total Available Expenditure (from Table 4)</b>	<b>134.9</b>	<b>145.9</b>	<b>32.9</b>	<b>62.9</b>	<b>79.2</b>	<b>258.7</b>	<b>178.7</b>	<b>60.8</b>	<b>252.3</b>	<b>136.7</b>	<b>126.0</b>	<b>124.6</b>	<b>139.2</b>	<b>122.3</b>	<b>221.0</b>	<b>198.5</b>	<b>158.8</b>	<b>2,433.6</b>					

**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).  
<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<b><u>Within the District</u></b>					
Portsmouth City Centre	476.3	566.9	24.6	542.3	66.0
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
<b>Sub-Total</b>	<b>625.7</b>	<b>744.6</b>	<b>41.6</b>	<b>703.1</b>	<b>77.4</b>
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
<b>Total</b>	<b>772.2</b>	<b>918.7</b>	<b>50.4</b>	<b>868.2</b>	<b>96.0</b>

**Note:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup> (£m)	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 <sup>(2)</sup> (£ 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 ]
<b><u>Within the District</u></b>							
Portsmouth City Centre	66.0	206.3	272.3	351.9	-79.6	6,250	-12,744
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
<b>Sub-Total</b>	<b>77.4</b>	<b>168.8</b>	<b>246.2</b>	<b>360.1</b>	<b>-113.9</b>	-	<b>-24,902</b>
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
<b>Total</b>	<b>96.0</b>	<b>217.6</b>	<b>313.6</b>	<b>389.0</b>	<b>-75.4</b>	-	<b>-10,894</b>

**Notes:**

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

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

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<b><u>Within the District</u></b>																							
Portsmouth City Centre	10.8	18.3	0.4	2.4	12.4	60.9	55.5	16.0	119.5	101.8	69.7	41.1	19.6	5.7	18.5	25.5	28.4	606.6	10	60.7	667.2		
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		
<b><u>Outside the District</u></b>																							
Chichester	89.5	104.6	22.1	53.4	10.3	17.0	50.2	19.9	6.6	1.8	2.0	8.9	2.6	0.6	2.6	0.6	2.8	395.6					
Fareham	0.0	0.0	0.0	0.0	0.9	10.6	3.6	0.0	0.0	0.9	0.0	12.7	90.9	18.4	110.5	123.0	53.6	425.2					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.1	0.2	1.3	20.4	57.5	79.7					
Havant	0.6	1.6	0.3	4.0	5.2	35.1	61.6	8.6	0.4	0.0	0.0	2.2	3.6	0.0	7.1	0.6	0.0	130.9					
Hedge End	0.7	2.0	0.0	0.7	2.6	6.6	0.0	2.4	3.0	0.8	0.9	7.2	3.1	52.1	30.2	15.5	6.1	133.9					
Southampton	2.7	2.2	0.0	2.2	5.5	14.8	7.1	2.9	24.3	5.3	2.8	9.7	8.7	44.4	51.0	23.1	14.2	220.8					
Waterlooville	0.0	1.8	0.3	0.9	8.1	127.7	4.3	0.5	0.4	0.4	0.6	6.0	0.6	0.0	0.0	1.1	0.0	152.5					
All other centres/stores	50.2	39.1	16.2	6.6	41.0	5.4	8.6	11.3	27.3	6.0	6.3	9.5	22.5	29.5	31.5	18.5	11.6	341.1					
<b>Total Available Expenditure (from Table 4)</b>	<b>161.3</b>	<b>174.5</b>	<b>39.4</b>	<b>73.3</b>	<b>92.4</b>	<b>301.5</b>	<b>215.8</b>	<b>73.5</b>	<b>296.3</b>	<b>160.5</b>	<b>148.0</b>	<b>146.3</b>	<b>162.6</b>	<b>153.8</b>	<b>258.0</b>	<b>231.8</b>	<b>182.9</b>	<b>2,871.8</b>					

**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).  
<sup>(1)</sup> 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**  
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**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 <sup>(1)</sup>]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<b><u>Within the District</u></b>					
Portsmouth City Centre	476.3	667.2	58.4	608.8	132.4
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
<b>Sub-Total</b>	<b>625.7</b>	<b>876.5</b>	<b>98.8</b>	<b>777.6</b>	<b>151.9</b>
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
<b>Total</b>	<b>772.2</b>	<b>1,081.3</b>	<b>120.0</b>	<b>961.3</b>	<b>189.1</b>

**Note:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup> (£m)	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 <sup>(2)</sup> (£ 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 ]
<b><u>Within the District</u></b>							
Portsmouth City Centre	132.4	206.3	338.7	376.5	-37.8	6,970	-5,422
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
<b>Sub-Total</b>	<b>151.9</b>	<b>168.8</b>	<b>320.7</b>	<b>385.7</b>	<b>-65.0</b>	-	<b>-15,244</b>
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
<b>Total</b>	<b>189.1</b>	<b>217.6</b>	<b>406.7</b>	<b>418.2</b>	<b>-11.5</b>	-	<b>2,166</b>

**Notes:**

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

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

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<b><u>Within the District</u></b>																							
Portsmouth City Centre	13.3	22.5	0.5	2.9	14.8	72.8	66.3	19.2	146.1	124.5	85.2	50.2	26.0	7.0	24.6	33.8	33.8	743.4	10.0	74.3	817.7		
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		
<b><u>Outside the District</u></b>																							
Chichester	110.2	128.7	27.2	63.9	12.3	20.4	59.9	23.8	8.0	2.2	2.5	10.9	3.5	0.8	3.5	0.8	3.3	481.9					
Fareham	0.0	0.0	0.0	0.0	1.1	12.7	4.2	0.0	0.0	1.1	0.0	15.5	120.5	22.9	146.5	163.1	63.7	551.3					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.1	0.3	1.7	27.1	68.3	97.8					
Havant	0.8	2.0	0.3	4.8	6.2	41.9	73.6	10.2	0.5	0.0	0.0	2.7	4.8	0.0	9.5	0.8	0.0	158.1					
Hedge End	0.9	2.5	0.0	0.8	3.2	7.9	0.0	2.9	3.7	0.9	1.1	8.8	4.1	64.6	40.0	20.5	7.3	169.2					
Southampton	3.3	2.7	0.0	2.7	6.5	17.8	8.5	3.5	29.7	6.5	3.5	11.9	11.5	55.1	67.5	30.6	16.9	278.0					
Waterlooville	0.0	2.2	0.4	1.0	9.7	152.7	5.1	0.6	0.4	0.4	0.7	7.3	0.7	0.0	0.0	1.5	0.0	182.8					
All other centres/stores	61.7	48.1	19.9	7.9	49.0	6.5	10.3	13.5	33.4	7.4	7.7	11.6	29.8	36.6	41.7	24.5	13.8	423.5					
<b>Total Available Expenditure (from Table 4)</b>	<b>198.6</b>	<b>214.8</b>	<b>48.5</b>	<b>87.7</b>	<b>110.5</b>	<b>360.6</b>	<b>257.8</b>	<b>87.8</b>	<b>362.2</b>	<b>196.2</b>	<b>180.9</b>	<b>178.8</b>	<b>215.4</b>	<b>190.9</b>	<b>341.9</b>	<b>307.1</b>	<b>217.4</b>	<b>3,557.0</b>					

**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).  
<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <i>[from Table 8 Col.C]</i>	B <i>[from Table 17]</i>	C <i>[see Note <sup>(1)</sup>]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<b><u>Within the District</u></b>					
Portsmouth City Centre	476.3	817.7	96.2	721.5	245.2
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
<b>Sub-Total</b>	<b>625.7</b>	<b>1073.9</b>	<b>162.7</b>	<b>911.2</b>	<b>285.4</b>
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
<b>Total</b>	<b>772.2</b>	<b>1,323.9</b>	<b>197.5</b>	<b>1,126.3</b>	<b>354.1</b>

**Note:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup> (£m)	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 <sup>(2)</sup> (£ 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 ]
<b><u>Within the District</u></b>							
Portsmouth City Centre	245.2	206.3	451.5	437.3	14.2	7,770	1,822
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
<b>Sub-Total</b>	<b>285.4</b>	<b>168.8</b>	<b>454.3</b>	<b>447.5</b>	<b>6.8</b>	-	<b>-3,701</b>
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
<b>Total</b>	<b>354.1</b>	<b>217.6</b>	<b>571.7</b>	<b>483.6</b>	<b>88.1</b>	-	<b>20,091</b>

**Notes:**

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

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

**PORTSMOUTH RETAIL STUDY**  
**Quantitative Need Assessment : Comparison Goods**  
**SCENARIO 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>		All Comparison Goods Turnover		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17		(%)	(£m)			
<b><u>Within the District</u></b>																							
Portsmouth City Centre	16.3	27.7	0.7	3.5	17.8	87.6	79.6	23.0	179.5	152.9	104.6	61.7	34.1	8.7	32.2	44.4	40.4	914.7	10	91.5	1006.2		
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		
<b><u>Outside the District</u></b>																							
Chichester	135.7	158.5	33.5	76.9	14.8	24.5	71.9	28.5	9.9	2.6	3.0	13.4	4.6	1.0	4.6	1.1	4.0	588.4					
Fareham	0.0	0.0	0.0	0.0	1.3	15.3	5.1	0.0	0.0	1.3	0.0	19.1	158.1	28.3	192.2	213.9	76.2	710.8					
Gosport	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2	0.3	2.3	35.6	81.6	120.2					
Havant	1.0	2.4	0.4	5.8	7.5	50.5	88.3	12.3	0.7	0.0	0.0	3.3	6.3	0.0	12.4	1.0	0.0	191.8					
Hedge End	1.1	3.1	0.0	1.0	3.8	9.5	0.0	3.4	4.5	1.2	1.3	10.8	5.4	79.9	52.5	26.9	8.7	213.1					
Southampton	4.1	3.3	0.0	3.2	7.9	21.4	10.2	4.1	36.4	7.9	4.2	14.6	15.1	68.1	88.6	40.1	20.2	349.5					
Waterlooville	0.0	2.7	0.5	1.3	11.7	183.8	6.1	0.7	0.5	0.5	0.9	9.0	1.0	0.0	0.0	1.9	0.0	220.6					
All other centres/Stores	76.0	59.2	24.5	9.5	59.0	7.8	12.4	16.2	41.1	9.1	9.4	14.3	39.1	45.3	54.7	32.1	16.5	526.2					
<b>Total Available Expenditure (from Table 4)</b>	<b>244.4</b>	<b>264.4</b>	<b>59.7</b>	<b>105.5</b>	<b>132.9</b>	<b>434.0</b>	<b>309.5</b>	<b>105.4</b>	<b>445.0</b>	<b>241.0</b>	<b>222.2</b>	<b>219.7</b>	<b>282.7</b>	<b>236.1</b>	<b>448.6</b>	<b>403.0</b>	<b>259.7</b>	<b>4,413.7</b>					

**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).

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup>]</i>	D <i>[D = B - C]</i>	E <i>[E = D - A]</i>
<b><u>Within the District</u></b>					
Portsmouth City Centre	476.3	1006.2	138.3	867.9	391.5
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
<b>Sub-Total</b>	<b>625.7</b>	<b>1321.0</b>	<b>234.0</b>	<b>1087.1</b>	<b>461.4</b>
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
<b>Total</b>	<b>772.2</b>	<b>1,627.7</b>	<b>284.1</b>	<b>1,343.6</b>	<b>571.4</b>

**Note:**

<sup>(1)</sup> 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 1: CONSTANT MARKET SHARES**

**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 <sup>(1)</sup> (£m)	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 <sup>(2)</sup> (£ 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 ]
<b><u>Within the District</u></b>							
Portsmouth City Centre	391.5	206.3	597.8	487.7	110.1	8,660	12,714
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
<b>Sub-Total</b>	<b>461.4</b>	<b>168.8</b>	<b>630.2</b>	<b>499.1</b>	<b>131.1</b>	-	<b>12,130</b>
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
<b>Total</b>	<b>571.4</b>	<b>217.6</b>	<b>789.0</b>	<b>539.3</b>	<b>249.7</b>	-	<b>43,259</b>

**Notes:**

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

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