

**Portsmouth Shopping Study
Update**

on Behalf of

Portsmouth City Council

**Volume 2:
Retail Capacity Tables
(Spreadsheets)**

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PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

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Table 1: Population Change by Zone

Zone	2004	2008	2011	2016
	(Base Year)			
Zone 1 - Selsey	37,878	38,545	38,851	39,438
Zone 2 - Chichester	39,791	41,903	43,306	45,782
Zone 3 - Midhurst	9,436	9,829	10,085	10,513
Zone 4 - Southbourne	16,745	17,594	18,116	18,956
Zone 5 - Petersfield	21,661	22,456	23,088	24,112
Zone 6 - Waterlooville	72,858	74,083	75,483	77,954
Zone 7 - Havant	55,349	55,503	56,148	57,455
Zone 8 - Hayling Island	16,309	15,941	15,843	15,742
Zone 9 - Portsmouth & Southsea	67,710	70,433	72,069	74,146
Zone 10 - Fratton	44,145	45,543	46,657	48,592
Zone 11 - North End	37,294	38,594	39,519	41,216
Zone 12 - Cosham	40,056	40,800	41,462	42,837
Zone 13 - Fareham	37,389	37,735	37,995	38,688
Zone 14 - Bishops Waltham & Botley	30,980	32,620	33,661	35,488
Zone 15 - Locks Heath	54,356	55,996	57,130	59,154
Zone 16 - Stubbington	57,652	59,224	59,986	61,243
Zone 17 - Gosport	44,941	46,643	47,161	47,968
Total (All Zones)	684,550	703,442	716,560	739,284

Notes:

- ⁽¹⁾ Population estimates and forecasts for all zones through to 2016 produced by Experian Business Strategies (EBS).

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Table 2a : Consumer Retail Expenditure on Non-Bulky Comparison Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾				
	2003	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	2,162.0	2,218.2	2,458.1	2,613.7	2,942.8
Zone 2 - Chichester	2,028.0	2,080.7	2,305.7	2,451.7	2,760.4
Zone 3 - Midhurst	2,112.0	2,166.9	2,401.2	2,553.3	2,874.7
Zone 4 - Southbourne	2,099.0	2,153.6	2,386.4	2,537.5	2,857.0
Zone 5 - Petersfield	2,156.0	2,212.1	2,451.2	2,606.4	2,934.6
Zone 6 - Waterlooville	1,973.0	2,024.3	2,243.2	2,385.2	2,685.5
Zone 7 - Havant	1,824.0	1,871.4	2,073.8	2,205.1	2,482.7
Zone 8 - Hayling Island	2,191.0	2,248.0	2,491.0	2,648.8	2,982.2
Zone 9 - Portsmouth & Southsea	2,036.0	2,088.9	2,314.8	2,461.4	2,771.3
Zone 10 - Fratton	1,664.0	1,707.3	1,891.9	2,011.7	2,264.9
Zone 11 - North End	1,834.0	1,881.7	2,085.1	2,217.2	2,496.3
Zone 12 - Cosham	1,762.0	1,807.8	2,003.3	2,130.1	2,398.3
Zone 13 - Fareham	2,010.0	2,062.3	2,285.2	2,429.9	2,735.9
Zone 14 - Bishops Waltham & Botley	2,141.0	2,196.7	2,434.2	2,588.3	2,914.2
Zone 15 - Locks Heath	2,079.0	2,133.1	2,363.7	2,513.4	2,829.8
Zone 16 - Stubbington	1,833.0	1,880.7	2,084.0	2,216.0	2,495.0
Zone 17 - Gosport	1,880.0	1,928.9	2,137.4	2,272.8	2,558.9

Notes:

- ⁽¹⁾ A 2003 expenditure per head estimate for non-bulky comparison goods was produced by EBS for each of the 17 zones comprising the Portsmouth household survey area. Expenditure per head has been projected forward to 2004 (the base year) and the forecast years of 2008, 2011 and 2016 within each zone by assuming the most appropriate of EBS' Expenditure Growth Forecasts. For 2004 and 2008, we apply EBS' Forecast for the period 2003-2008 of 2.6% p.a., whilst for 2011 and 2016, we apply EBS' Forecast for the period 2003-2013 of 2.4% p.a.).

PORTSMOUTH RETAIL STUDY
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Table 2b : Consumer Retail Expenditure on Bulky Comparison Goods Per Head of Population By Zone (including Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾				
	2003	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	1,124.0	1,176.8	1,414.2	1,526.5	1,848.3
Zone 2 - Chichester	1,045.0	1,094.1	1,314.8	1,419.2	1,718.4
Zone 3 - Midhurst	1,092.0	1,143.3	1,373.9	1,483.0	1,795.7
Zone 4 - Southbourne	1,095.0	1,146.5	1,377.7	1,487.1	1,800.6
Zone 5 - Petersfield	1,113.0	1,165.3	1,400.3	1,511.5	1,830.2
Zone 6 - Waterlooville	1,008.0	1,055.4	1,268.2	1,368.9	1,657.5
Zone 7 - Havant	921.0	964.3	1,158.8	1,250.8	1,514.5
Zone 8 - Hayling Island	1,135.0	1,188.3	1,428.0	1,541.4	1,866.4
Zone 9 - Portsmouth & Southsea	1,025.0	1,073.2	1,289.6	1,392.0	1,685.5
Zone 10 - Fratton	813.0	851.2	1,022.9	1,104.1	1,336.9
Zone 11 - North End	931.0	974.8	1,171.3	1,264.4	1,530.9
Zone 12 - Cosham	900.0	942.3	1,132.3	1,222.3	1,479.9
Zone 13 - Fareham	1,036.0	1,084.7	1,303.4	1,407.0	1,703.6
Zone 14 - Bishops Waltham & Botley	1,097.0	1,148.6	1,380.2	1,489.8	1,803.9
Zone 15 - Locks Heath	1,057.0	1,106.7	1,329.9	1,435.5	1,738.1
Zone 16 - Stubbington	934.0	977.9	1,175.1	1,268.4	1,535.9
Zone 17 - Gosport	947.0	991.5	1,191.5	1,286.1	1,557.2

Notes:

- ⁽¹⁾ A 2003 expenditure per head estimate for bulky comparison goods was produced by EBS for each of the 17 zones comprising the Portsmouth household survey area. Expenditure per head has been projected forward to 2004 (the base year) and the forecast years of 2008, 2011 and 2016 within each zone by assuming the most appropriate of EBS' Expenditure Growth Forecasts. For 2004 and 2008, we apply EBS' Forecast for the period 2003-2008 of 4.7% p.a., whilst for 2011 and 2016, we apply EBS' Forecast for the period 2003-2013 of 3.9% p.a.

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Table 3a : Consumer Retail Expenditure on Non-Bulky Comparison Goods Per Head of Population By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Expenditure Per Head (£) ⁽¹⁾			
	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	2,080.7	2,305.7	2,451.6	2,760.3
Zone 2 - Chichester	1,951.7	2,162.8	2,299.7	2,589.2
Zone 3 - Midhurst	2,032.6	2,252.3	2,394.9	2,696.5
Zone 4 - Southbourne	2,020.1	2,238.5	2,380.2	2,679.9
Zone 5 - Petersfield	2,074.9	2,299.3	2,444.8	2,752.7
Zone 6 - Waterlooville	1,898.8	2,104.1	2,237.3	2,519.0
Zone 7 - Havant	1,755.4	1,945.2	2,068.4	2,328.8
Zone 8 - Hayling Island	2,108.6	2,336.6	2,484.5	2,797.3
Zone 9 - Portsmouth & Southsea	1,959.4	2,171.3	2,308.8	2,599.4
Zone 10 - Fratton	1,601.4	1,774.6	1,886.9	2,124.5
Zone 11 - North End	1,765.0	1,955.9	2,079.7	2,341.5
Zone 12 - Cosham	1,695.7	1,879.1	1,998.1	2,249.6
Zone 13 - Fareham	1,934.4	2,143.6	2,279.3	2,566.2
Zone 14 - Bishops Waltham & Botley	2,060.5	2,283.3	2,427.8	2,733.5
Zone 15 - Locks Heath	2,000.8	2,217.1	2,357.5	2,654.3
Zone 16 - Stubbington	1,764.1	1,954.8	2,078.6	2,340.3
Zone 17 - Gosport	1,809.3	2,004.9	2,131.9	2,400.3

Notes:

- ⁽¹⁾ Expenditure per head on non-bulky comparison goods has been discounted by 6.2% (over the figures in Table 2a) to exclude spending by Special Forms of Trading (SFT). This is the latest SFT estimate provided by EBS. We assume the proportion of non-bulky comparison goods expenditure taken-up by SFT will remain constant through to 2016.

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

Zone	Expenditure Per Head (£) ⁽¹⁾			
	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	1,095.6	1,316.6	1,421.2	1,720.8
Zone 2 - Chichester	1,018.6	1,224.1	1,321.3	1,599.8
Zone 3 - Midhurst	1,064.4	1,279.1	1,380.7	1,671.8
Zone 4 - Southbourne	1,067.4	1,282.6	1,384.5	1,676.4
Zone 5 - Petersfield	1,084.9	1,303.7	1,407.2	1,703.9
Zone 6 - Waterlooville	982.6	1,180.7	1,274.5	1,543.2
Zone 7 - Havant	897.8	1,078.8	1,164.5	1,410.0
Zone 8 - Hayling Island	1,106.3	1,329.5	1,435.1	1,737.6
Zone 9 - Portsmouth & Southsea	999.1	1,200.6	1,296.0	1,569.2
Zone 10 - Fratton	792.5	952.3	1,027.9	1,244.6
Zone 11 - North End	907.5	1,090.5	1,177.1	1,425.3
Zone 12 - Cosham	877.3	1,054.2	1,137.9	1,377.8
Zone 13 - Fareham	1,009.8	1,213.5	1,309.9	1,586.0
Zone 14 - Bishops Waltham & Botley	1,069.3	1,285.0	1,387.0	1,679.4
Zone 15 - Locks Heath	1,030.3	1,238.1	1,336.4	1,618.2
Zone 16 - Stubbington	910.4	1,094.0	1,180.9	1,429.9
Zone 17 - Gosport	923.1	1,109.3	1,197.4	1,449.8

Notes:

⁽¹⁾ Expenditure per head on bulky comparison goods has been discounted by 6.9% (over the figures in Table 2b) to exclude spending by Special Forms of Trading (SFT). This is the latest SFT estimate provided by EBS. We assume the proportion of bulky comparison goods expenditure taken-up by SFT will remain constant through to 2016.

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Table 4a : Total Available Non-Bulky Comparison Goods Retail Expenditure By Zone (excluding Expenditure by Special Forms of Trading)

Zone	Total Non-Bulky Expenditure (£m) ⁽¹⁾			
	Base Year	Forecast Years		
	2004	2008	2011	2016
Zone 1 - Selsey	78.8	88.9	95.2	108.9
Zone 2 - Chichester	77.7	90.6	99.6	118.5
Zone 3 - Midhurst	19.2	22.1	24.2	28.3
Zone 4 - Southbourne	33.8	39.4	43.1	50.8
Zone 5 - Petersfield	44.9	51.6	56.4	66.4
Zone 6 - Waterlooville	138.3	155.9	168.9	196.4
Zone 7 - Havant	97.2	108.0	116.1	133.8
Zone 8 - Hayling Island	34.4	37.2	39.4	44.0
Zone 9 - Portsmouth & Southsea	132.7	152.9	166.4	192.7
Zone 10 - Fratton	70.7	80.8	88.0	103.2
Zone 11 - North End	65.8	75.5	82.2	96.5
Zone 12 - Cosham	67.9	76.7	82.8	96.4
Zone 13 - Fareham	72.3	80.9	86.6	99.3
Zone 14 - Bishops Waltham & Botley	63.8	74.5	81.7	97.0
Zone 15 - Locks Heath	108.8	124.2	134.7	157.0
Zone 16 - Stubbington	101.7	115.8	124.7	143.3
Zone 17 - Gosport	81.3	93.5	100.5	115.1
Total (All Zones)	1289.4	1468.4	1590.6	1847.7

Notes:

- ⁽¹⁾ Expenditure totals were calculated as follows:
Population (Table 1) multiplied by consumer expenditure per head on non-bulky comparison goods after making appropriate deductions for Special Forms of Trading (Table 3a).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

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

Zone	Total Bulky Expenditure (£m) ⁽¹⁾			
	Base Year	Forecast Years		
	2004	2008	2011	2018
Zone 1 - Selsey	41.5	50.7	55.2	67.9
Zone 2 - Chichester	40.5	51.3	57.2	73.2
Zone 3 - Midhurst	10.0	12.6	13.9	17.6
Zone 4 - Southbourne	17.9	22.6	25.1	31.8
Zone 5 - Petersfield	23.5	29.3	32.5	41.1
Zone 6 - Waterlooville	71.6	87.5	96.2	120.3
Zone 7 - Havant	49.7	59.9	65.4	81.0
Zone 8 - Hayling Island	18.0	21.2	22.7	27.4
Zone 9 - Portsmouth & Southsea	67.7	84.6	93.4	116.3
Zone 10 - Fratton	35.0	43.4	48.0	60.5
Zone 11 - North End	33.8	42.1	46.5	58.7
Zone 12 - Cosham	35.1	43.0	47.2	59.0
Zone 13 - Fareham	37.8	45.8	49.8	61.4
Zone 14 - Bishops Waltham & Botley	33.1	41.9	46.7	59.6
Zone 15 - Locks Heath	56.0	69.3	76.4	95.7
Zone 16 - Stubbington	52.5	64.8	70.8	87.6
Zone 17 - Gosport	41.5	51.7	56.5	69.5
Total (All Zones)	665.2	821.6	903.4	1128.6

Notes:

- ⁽¹⁾ Expenditure totals were calculated as follows:
Population (Table 1) multiplied by consumer expenditure per head on non-bulky comparison goods after making appropriate deductions for Special Forms of Trading (Table 3b).

PORTSMOUTH RETAIL STUDY
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Table 5A : Estimated Non-Bulky Comparison Goods Market Shares by Zone, 2004 (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	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
Outside the District																	
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.

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Table 5B : Estimated Bulky Comparison Goods Market Shares by Zone, 2004 (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	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
Outside the District																	
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.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 6A : Non-Bulky Comparison Goods Retail Expenditure Pattern and Centre Turnover Estimates, 2004 (£million)

Centre	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	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Non-Bulky Comparison Goods Turnover (£m)	Non-Bulky Comparison Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) ⁽³⁾	Benchmark Non-Bulky Comparison Goods Turnover (£m)	Extent of Any Over/Under Trading (£m)	
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botolph	Locks Heath	Stubbington	Gosport	A	B	C=A+B	D	E=C/D	F	G=FxD	H=C-G	
Within the District																										
Portsmouth City Centre	5.7	9.2	0.3	1.5	7.9	36.1	33.0	10.0	67.0	57.2	42.7	23.8	12.2	3.4	10.7	16.5	18.2	355.4	35.5	391.0	43,000	9,092	5,500	236.5	154.5	
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	1.7	0.0	0.0	0.0	0.0	0.2	6.4	0.4	0.0	0.0	0.0	0.0	8.9	0.0	8.9	4,636	1,930	2,750	12.7	-3.8	
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	1.9	3,302	570	2,750	9.1	-7.2	
Gunwharf Quays	2.9	0.5	0.0	1.1	1.2	3.0	2.5	1.1	15.9	2.3	4.8	2.6	1.9	1.5	0.7	2.0	4.1	48.2	12.0	60.2	9,771	6,166	6,000	58.6	1.6	
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	9.3	0.0	0.0	0.0	0.0	0.0	0.0	9.3	0.0	9.3	8,068	1,150	2,750	22.2	-12.9	
Southsea Town Centre	0.9	1.5	0.0	0.2	0.4	1.1	1.9	1.0	17.0	2.3	1.2	4.4	1.1	0.3	1.2	0.0	1.0	35.4	5.3	40.7	17,190	2,368	2,750	47.3	-6.6	
Out of Centre Retail Parks / Large Stores	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	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	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	3.6						
Outside the District	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								
Chichester	44.0	44.7	10.9	25.6	5.7	11.5	32.1	12.4	4.0	1.1	1.3	6.0	1.7	0.4	1.6	0.4	1.2	204.7								
Fareham	0.0	0.0	0.0	0.0	0.6	6.8	2.3	0.0	0.0	0.6	0.0	7.7	42.4	9.6	50.2	48.8	13.2	182.2								
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	0.1	0.0	10.5	29.7	40.4								
Havant	0.1	0.5	0.0	0.7	0.0	5.0	15.6	3.0	0.0	0.0	1.0	0.0	0.0	0.0	0.5	0.0	0.0	26.5								
Hedge End	0.2	1.0	0.0	0.5	0.9	1.4	0.0	1.5	0.0	0.5	0.3	2.7	0.7	7.3	6.2	1.0	0.5	24.7								
Southampton	1.2	1.1	0.0	1.3	3.0	7.5	4.1	1.4	14.6	3.4	1.8	5.2	4.7	25.1	29.1	13.3	9.3	126.2								
Waterlooville	0.0	0.5	0.0	0.0	3.0	61.0	1.6	0.2	0.0	0.0	0.4	3.1	0.4	0.0	0.0	0.7	0.0	70.8								
All other centres/stores	24.0	18.6	7.9	3.0	21.9	3.3	4.0	3.6	10.2	1.9	3.8	5.0	6.7	16.1	8.5	8.4	4.1	151.2								
Total Available Expenditure (from Table 4A)	78.81	77.66	19.18	33.83	44.94	138.34	97.16	34.39	132.67	70.69	65.82	67.92	72.33	63.83	108.76	101.70	81.31	1,289.36								

Notes:

For each cell, the monetary figure is derived by multiplying the 2004 available non-bulky comparison goods expenditure in the zone (Table 4A) by the 2004 market share of the specified Centre in that zone (Table 5A).

(1) Estimated by Colliers CRE.

(2) Floorspace estimates derived based on a combination of published ODPM, Experian GOAD and IGD floorspace data. (See Appendix 3B).

(3) Colliers CRE estimates based on information in the UK Retail Rankings, 2004 (Mintel) (See Appendix 3B).

Table 6B: Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2004 (£million)

Centre	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	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure ⁽¹⁾	Total Bulky Comparison Goods Turnover (£m)	Bulky Comparison Goods Floorspace (sq.m. net) ⁽²⁾	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) ⁽³⁾	Benchmark Bulky Comparison Goods Turnover (£m)	Extent of Any Over/Under Trading (£m)	
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botley	Locks Heath	Stubbington	Gosport	A	B	C=A+B	D	E=C/D	F	G=FxD	H=C-G	
Within the District																										
Portsmouth City Centre	2.3	3.0	0.0	0.2	1.1	5.4	3.8	1.2	11.2	8.8	3.1	4.5	0.7	0.0	0.9	0.0	0.3	46.5	4.65	51.2	4,000	12,795	4,000	16.0	35.2	
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	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.00	1.9	949	2,023	2,000	1.9	0.0	
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	1.7	0.1	0.1	0.0	0.0	0.0	0.0	0.0	2.5	0.00	2.5	826	3,083	2,000	1.7	0.9	
Gunwharf Quays	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.19	0.9	404	2,313	2,000	0.8	0.1	
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.5	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.00	2.9	4,539	643	2,000	9.1	-6.2	
Southsea Town Centre	1.2	0.9	0.0	0.6	0.5	0.0	0.4	0.5	1.5	0.2	0.3	1.7	0.0	0.0	0.6	0.0	0.0	8.5	1.27	9.8	4,298	2,274	2,000	8.6	1.2	
Out of Centre Retail Parks / Large Stores	0.0	0.6	0.0	0.3	2.3	10.0	11.0	5.3	40.5	21.5	29.2	19.4	3.4	0.0	0.9	0.0	0.5	145.0	0.00	145.0	36,481	3,974	2,292	83.6	61.4	
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.4	0.6	0.0	0.0	0.0	0.0	1.9	0.00	1.9						
Outside the District																										
Chichester	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								
Fareham	22.8	26.4	5.5	11.9	1.9	0.0	0.9	1.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	71.8								
Gosport	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1.1	19.0	1.8	20.0	33.6	23.9	99.8								
Havant	0.0	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	0.9	3.0	8.5	12.5								
Hedge End	0.4	0.6	0.2	2.3	4.1	20.5	27.7	3.2	0.3	0.0	0.0	0.6	2.6	0.0	4.3	0.4	67.1									
Southampton	0.4	0.4	0.0	0.0	1.1	3.4	0.0	0.2	2.3	0.0	0.3	2.4	1.4	27.2	13.7	9.9	66.5									
Waterlooville	0.8	0.4	0.0	0.2	1.0	2.8	0.6	0.6	1.1	0.0	0.0	1.5	1.1	2.1	2.6	1.7	16.6									
All other centres/stores	0.0	0.7	0.3	0.7	3.2	27.6	1.4	0.2	0.3	0.2	0.0	1.1	0.0	0.0	0.0	0.0	35.5									
Total Available Expenditure (from Table 4B)	41.50	40.53	10.04	17.87	23.50	71.59	49.69	18.04	67.65	34.98	33.84	35.14	37.76	33.13	56.00	52.49	41.48	665.25								

Notes:

For each cell, the monetary figure is derived by multiplying the 2004 available bulky comparison expenditure in the zone (Table 4B) by the 2004 market share of the specified Centre in that zone (Table 5B).

(1) Estimated by Colliers CRE.

(2) Floorspace estimates derived based on a combination of published ODPM, Experian GOAD and IGD floorspace data . (See Appendix 3C).

(3) Colliers CRE estimates based on information in the UK Retail Rankings, 2004 (Mintel) (See Appendix 3C).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 7A : Adjusted Non-Bulky Comparison Goods Market Shares by Zone, 2004 (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	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 / Large Stores	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
Outside the District																	
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

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

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 7B : Adjusted Bulky Comparison Goods Market Shares by Zone, 2004 (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	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 / Large Stores	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
Outside the District																	
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

Note: The Market Share percentages are the same as those set out in Table 5B, because we do not consider there are material qualitative need arguments for making any adjustments.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 8A : Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2008 (£million)

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Non-Bulky Comparison Goods Turnover	
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botley	Locks Heath	Stubbington	Gosport	(Zones 1 - 17)			
Within the District																					
Portsmouth City Centre	6.4	10.8	0.4	1.7	9.0	40.7	36.7	10.8	77.2	65.4	48.9	26.9	13.7	4.0	12.2	18.8	20.9	404.5	40.5	445.0	
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	1.9	0.0	0.0	0.0	0.0	0.2	7.2	0.5	0.0	0.0	0.0	0.0	10.1	0.0	10.1	
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	2.2	
Gunwharf Quays	3.3	0.5	0.0	1.3	1.4	3.4	2.8	1.2	18.4	2.6	5.5	2.9	2.1	1.8	0.7	2.3	4.8	55.0	13.8	68.8	
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	10.6	0.0	0.0	0.0	0.0	0.0	0.0	10.6	0.0	10.6	
Southsea Town Centre	1.0	1.7	0.0	0.2	0.5	1.2	2.2	1.1	19.6	2.6	1.4	5.0	1.2	0.3	1.4	0.0	1.1	40.4	6.1	46.5	
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	
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	4.2	
Outside the District	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			
Chichester	49.6	52.1	12.6	29.9	6.5	12.9	35.6	13.5	4.6	1.3	1.5	6.8	1.9	0.4	1.9	0.5	1.4	233.1			
Fareham	0.0	0.0	0.0	0.0	0.7	7.6	2.6	0.0	0.0	0.6	0.0	8.7	47.4	11.2	57.4	55.6	15.1	206.9			
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	0.1	0.1	0.0	11.9	34.1	46.3			
Havant	0.1	0.6	0.0	0.8	0.1	5.6	17.4	3.3	0.0	0.0	0.0	1.1	0.0	0.0	0.6	0.0	0.0	29.5			
Hedge End	0.2	1.2	0.0	0.6	1.0	1.6	0.0	1.6	0.0	0.6	0.4	3.1	0.8	8.5	7.1	1.2	0.6	28.2			
Southampton	1.3	1.3	0.0	1.5	3.5	8.4	4.5	1.6	16.8	3.9	2.1	5.9	5.3	29.3	33.3	15.2	10.7	144.5			
Waterlooville	0.0	0.6	0.0	0.0	3.4	68.7	1.7	0.2	0.0	0.0	0.5	3.5	0.4	0.0	0.0	0.8	0.0	79.9			
All other centres/Stores	27.0	21.8	9.2	3.5	25.2	3.7	4.4	3.9	11.7	2.2	4.4	5.6	7.5	18.8	9.7	9.6	4.8	173.0			
Total Available Expenditure (from Table 4A)	88.87	90.63	22.14	39.38	51.63	155.88	107.96	37.25	152.93	80.82	75.48	76.67	80.89	74.48	124.15	115.77	93.52	1,468.4			

Notes:

For each cell, the monetary figure is derived by multiplying the 2008 available non-bulky comparison goods expenditure in the zone (Table 4a) by the 2004 non-bulky comparison goods market share of the specified centre in that zone (Table 7a).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 8B: Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2008 (£million)

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Bulky Comparison Goods Turnover
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	2.8	3.8	0.0	0.2	1.3	6.6	4.6	1.5	14.0	10.9	3.8	5.5	0.9	0.0	1.1	0.0	0.4	57.5	5.7	63.2
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	2.3	0.0	2.3
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.4	2.1	0.2	0.1	0.0	0.0	0.0	0.0	0.0	3.1	0.0	3.1
Gunwharf Quays	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.2	1.2
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.6	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	3.5
Southsea Town Centre	1.5	1.1	0.0	0.8	0.6	0.0	0.5	0.6	1.9	0.3	0.3	2.1	0.0	0.0	0.8	0.0	0.0	10.5	1.6	12.1
Out of Centre Retail Parks	0.0	0.8	0.1	0.4	2.8	12.2	13.3	6.3	50.6	26.7	36.4	23.7	4.2	0.0	1.1	0.0	0.6	179.0	0.0	179.0
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.5	0.8	0.0	0.0	0.0	0.0	2.4	0.0	2.4
Outside the District	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		
Chichester	27.9	33.4	6.8	15.0	2.3	0.0	1.1	1.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	89.5		
Fareham	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	1.3	23.0	2.3	24.8	41.5	29.8	123.2		
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	1.1	3.7	10.6	15.5		
Havant	0.5	0.7	0.3	2.9	5.2	25.0	33.4	3.7	0.4	0.0	0.0	0.7	3.2	0.0	5.3	0.5	0.0	81.7		
Hedge End	0.5	0.5	0.0	0.0	1.4	4.1	0.0	0.2	2.9	0.0	0.3	3.0	1.7	34.5	17.0	12.2	4.8	83.0		
Southampton	1.0	0.5	0.0	0.3	1.2	3.4	0.8	0.7	1.4	0.0	0.0	1.9	1.3	2.6	3.3	2.1	0.0	20.5		
Waterlooville	0.0	0.9	0.3	0.8	4.0	33.7	1.7	0.2	0.3	0.3	0.0	1.3	0.0	0.0	0.0	0.0	0.0	43.5		
All other centres/Stores	16.5	9.7	5.1	2.1	10.2	0.4	2.3	5.4	10.9	2.6	0.4	2.1	10.7	2.5	15.0	4.7	4.7	105.3		
Total Available Expenditure (from Table 4B)	50.75	51.29	12.57	22.57	29.28	87.47	59.88	21.19	84.56	43.37	42.09	43.01	45.79	41.92	69.33	64.79	51.74	821.60		

Notes:

For each cell, the monetary figure is derived by multiplying the 2008 available bulky comparison goods expenditure in the zone (Table 4b) by the 2004 bulky comparison goods market share of the specified Centre in that zone (Table 7b).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 9A : Calculation of Potential Non-Bulky Comparison Goods 'Headroom' Expenditure for Portsmouth City, 2008 (£ million)

Centre	2004 Turnover	2008 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2008	Residual Turnover Potential by 2008	Potential Headroom Expenditure by 2008
	A <i>[from Table 6a Col.C]</i>	B <i>[from Table 8a]</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	391.0	445.0	24.0	421.0	30.0
Cosham Suburban Centre	8.9	10.1	0.5	9.5	0.6
Fratton Suburban Centre	1.9	2.2	0.1	2.0	0.2
Gunwharf Quays	60.2	68.8	3.7	65.1	4.8
North End/London Road Suburban Centre	9.3	10.6	0.6	10.1	0.8
Southsea Town Centre	40.7	46.5	2.5	44.0	3.3
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	3.6	4.2	0.2	4.0	0.3

Notes:

(1) We assume that non-bulky comparison goods retail floorspace will achieve real sales productivity gains of 1.5% per annum based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 9B : Calculation of Potential Bulky Comparison Goods 'Headroom' Expenditure for Portsmouth City, 2008 (£ million)

Centre	2004 Turnover	2008 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2008	Residual Turnover Potential by 2008	Potential Headroom Expenditure by 2008
	A <i>[from Table 6b Col.C]</i>	B <i>[from Table 8b]</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	51.2	63.2	3.1	60.1	8.9
Cosham Suburban Centre	1.9	2.3	0.1	2.2	0.3
Fratton Suburban Centre	2.5	3.1	0.2	3.0	0.4
Gunwharf Quays	0.9	1.2	0.1	1.1	0.2
North End/London Road Suburban Centre	2.9	3.5	0.2	3.3	0.4
Southsea Town Centre	9.8	12.1	0.6	11.5	1.7
Out of Centre Retail Parks	145.0	179.0	8.9	170.1	25.1
All other local centres/stores	1.9	2.4	0.1	2.3	0.3

Notes:

(1) We assume that bulky comparison goods retail floorspace will achieve real sales productivity gains of 1.5% per annum based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 10A : Non-Bulky Comparison Goods Floorspace Need in Portsmouth City, 2008

Centre	Potential Headroom Expenditure by 2008 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2008 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Residual Headroom Expenditure by 2008 (£m)	Assumed Sales Density in 2008 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2008 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 9A Col. E]		[C = A - B]	[From Table 6A Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	30.0	0.0	30.0	154.5	184.5	5,837	31,605
Cosham Suburban Centre	0.6	0.0	0.6	-3.8	-3.2	2,919	-1,096
Fratton Suburban Centre	0.2	0.5	-0.4	-7.2	-7.6	2,919	-2,594
Gunwharf Quays	4.8	27.6	-22.7	1.6	-21.1	6,368	-3,317
North End/London Road Suburban Centre	0.8	0.0	0.8	-12.9	-12.1	2,919	-4,150
Southsea Town Centre	3.3	1.0	2.3	-6.6	-4.2	2,919	-1,446
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	0.3	16.2	-15.9	0.0	-15.9	2,919	-5,450
Total					120.4		13,552

Notes:

(1) There are a range of non-bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4B, together with our estimates for their 2004 non-bulky comparison goods turnovers. Turnovers for 2008 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £5,500 per sq m in the base year of 2004 (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2008. For the Suburban Centres, we have assumed the benchmark sales density of £2,750 per sq m in the base year apart from Gunwharf Quays which we assumed to be £6,000 per sq m (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2008. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,750 in 2004, grossed up by 1.5% p.a. through to 2008.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 10B : Bulky Comparison Goods Floorspace Need in Portsmouth City, 2008

Centre	Potential Headroom Expenditure by 2008 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2008 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Residual Headroom Expenditure by 2008 (£m)	Assumed Sales Density in 2008 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2008 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 9B Col. E]		[C = A - B]	[From Table 6B Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	8.9	0.0	8.9	35.2	44.1	4,245	10,379
Cosham Suburban Centre	0.3	0.0	0.3	0.0	0.3	2,123	156
Fratton Suburban Centre	0.4	0.0	0.4	0.9	1.3	2,123	628
Gunwharf Quays	0.2	0.0	0.2	0.1	0.3	2,123	141
North End/London Road Suburban Centre	0.4	0.0	0.4	-6.2	-5.7	2,123	-2,702
Southsea Town Centre	1.7	0.0	1.7	1.2	2.9	2,123	1,354
Out of Centre Retail Parks	25.1	29.2	-4.1	61.4	57.3	2,433	23,552
All other local centres/stores	0.3	0.0	0.3	0.0	0.3	2,123	156
Total					100.8		33,664

Notes:

(1) There are a range of bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4C, together with our estimates for their 2004 bulky comparison goods turnovers. Turnovers for 2008 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £4,000 per sq m in the base year of 2004 (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2008. For the Suburban Centres, we have assumed the benchmark sales density of £2,000 per sq m in the base year (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2008. For out of centre retail, we have assumed the benchmark sales density of £2,292 per sq m in 2004 (see Col. F, Table 6B) grossed up by 1.5% p.a. through to 2008. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,000 in 2004, grossed up by 1.5% p.a. through to 2008.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 11A : Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2011 (£million)

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Non-Bulky Comparison Goods Turnover
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	6.9	11.9	0.4	1.9	9.9	44.1	39.5	11.5	84.0	71.2	53.3	29.1	14.6	4.4	13.2	20.2	22.5	438.4	43.8	482.3
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.3	2.0	0.0	0.0	0.0	0.0	0.2	7.8	0.5	0.0	0.0	0.0	0.0	10.9	0.0	10.9
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	2.3
Gunwharf Quays	3.5	0.6	0.0	1.4	1.5	3.7	3.0	1.3	20.0	2.8	6.0	3.1	2.3	2.0	0.8	2.5	5.1	59.6	14.9	74.5
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	11.6	0.0	0.0	0.0	0.0	0.0	0.0	11.6	0.0	11.6
Southsea Town Centre	1.0	1.9	0.0	0.2	0.6	1.4	2.3	1.2	21.3	2.8	1.5	5.4	1.3	0.3	1.5	0.0	1.2	43.9	6.6	50.4
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
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	0.0	4.6
Outside the District																				
Chichester	53.1	57.3	13.8	32.7	7.1	14.0	38.3	14.2	5.0	1.4	1.6	7.4	2.1	0.5	2.0	0.5	1.5	252.6		
Fareham	0.0	0.0	0.0	0.0	0.8	8.3	2.8	0.0	0.0	0.7	0.0	9.4	50.7	12.3	62.2	59.8	16.3	223.3		
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	0.2	0.0	12.8	36.7	49.8		
Havant	0.1	0.7	0.0	0.9	0.1	6.1	18.7	3.5	0.0	0.0	0.0	1.2	0.0	0.0	0.7	0.0	0.0	31.8		
Hedge End	0.2	1.3	0.0	0.6	1.1	1.7	0.0	1.7	0.0	0.6	0.4	3.3	0.9	9.3	7.7	1.2	0.6	30.7		
Southampton	1.4	1.4	0.0	1.7	3.8	9.1	4.9	1.7	18.3	4.2	2.3	6.4	5.6	32.1	36.1	16.3	11.5	156.8		
Waterlooville	0.0	0.7	0.0	0.0	3.7	74.5	1.9	0.2	0.0	0.0	0.5	3.8	0.4	0.0	0.0	0.9	0.0	86.6		
All other centres/stores	29.0	23.9	10.0	3.8	27.5	4.1	4.8	4.1	12.7	2.4	4.8	6.0	8.1	20.7	10.5	10.3	5.1	187.8		
Total Available Expenditure (from Table 4A)	95.25	99.59	24.15	43.12	56.45	168.88	116.13	39.36	166.39	88.04	82.19	82.84	86.60	81.72	134.69	124.69	100.54	1,590.63		

Notes:

For each cell, the monetary figure is derived by multiplying the 2011 available non-bulky comparison goods expenditure in the zone (Table 4a) by the 2004 non-bulky comparison goods market share of the specified centre in that zone (Table 7a).

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Quantitative Retail Need Assessment : Comparison Goods

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

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Bulky Comparison Goods Turnover
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	3.1	4.2	0.0	0.2	1.5	7.3	5.0	1.6	15.4	12.0	4.2	6.1	0.9	0.0	1.2	0.0	0.5	63.3	6.3	69.6
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	2.6	0.0	2.6
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.5	2.4	0.2	0.1	0.0	0.0	0.0	0.0	0.0	3.5	0.0	3.5
Gunwharf Quays	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.3	1.3
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.6	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	3.8
Southsea Town Centre	1.7	1.2	0.0	0.9	0.7	0.0	0.6	0.6	2.1	0.3	0.4	2.3	0.0	0.0	0.8	0.0	0.0	11.5	1.7	13.3
Out of Centre Retail Parks	0.0	0.9	0.1	0.5	3.2	13.4	14.5	6.7	55.9	29.5	40.2	26.0	4.5	0.0	1.2	0.0	0.7	197.1	0.0	197.1
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.6	0.8	0.0	0.0	0.0	0.0	2.6	0.0	2.6
Outside the District																				
Chichester	30.3	37.3	7.6	16.7	2.6	0.0	1.2	1.9	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	98.8		
Fareham	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	1.4	25.0	2.6	27.3	45.4	32.5	134.8		
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	1.2	4.0	11.6	17.0		
Havant	0.6	0.8	0.3	3.2	5.7	27.5	36.4	4.0	0.5	0.0	0.8	3.4	0.0	0.0	5.8	0.6	0.0	89.6		
Hedge End	0.6	0.5	0.0	0.0	1.5	4.5	0.0	0.2	3.2	0.0	0.4	3.3	1.9	38.4	18.7	13.3	5.3	91.7		
Southampton	1.1	0.5	0.0	0.3	1.4	3.8	0.8	0.8	1.5	0.0	0.0	2.1	1.4	2.9	3.6	2.3	0.0	22.6		
Waterlooville	0.0	1.0	0.4	0.9	4.4	37.0	1.8	0.2	0.4	0.3	0.0	1.4	0.0	0.0	0.0	0.0	0.0	47.9		
All other centres/Stores	17.9	10.8	5.6	2.4	11.3	0.5	2.5	5.8	12.0	2.9	0.4	2.3	11.6	2.8	16.5	5.2	5.1	115.7		
Total Available Expenditure (from Table 4B)	55.21	57.22	13.92	25.08	32.49	96.20	65.38	22.74	93.40	47.96	46.52	47.18	49.77	46.69	76.35	70.84	56.47	903.42		

Notes:

For each cell, the monetary figure is derived by multiplying the 2011 available bulky comparison goods expenditure in the zone (Table 4b) by the 2004 bulky comparison goods market share of the specified Centre in that zone (Table 7b).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

**Table 12A : Calculation of Potential Non-Bulky Comparison Goods 'Headroom'
Expenditure for Portsmouth City, 2011 (£ million)**

Centre	2004 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A [[from Table 6a Col.C]	B [[from Table 11a]	C [see Note ⁽¹⁾]	D [D = B - C]	E [E = D - A]
Within the District					
Portsmouth City Centre	391.0	482.3	42.9	439.3	48.4
Cosham Suburban Centre	8.9	10.9	1.0	9.9	1.0
Fratton Suburban Centre	1.9	2.3	0.2	2.1	0.3
Gunwharf Quays	60.2	74.5	6.6	67.9	7.7
North End/London Road Suburban Centre	9.3	11.6	1.0	10.6	1.3
Southsea Town Centre	40.7	50.4	4.5	46.0	5.3
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	3.6	4.6	0.4	4.2	0.5

Notes:

(1) We assume that comparison goods retail floorspace (incl. non-bulky goods) will achieve real sales productivity gains of 1.5% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 12B : Calculation of Potential Bulky Comparison Goods 'Headroom' Expenditure for Portsmouth City, 2011 (£ million)

Centre	2004 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A <i>[[from Table 6b Col.C]</i>	B <i>[[from Table 11b]</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	51.2	69.6	5.6	64.0	12.8
Cosham Suburban Centre	1.9	2.6	0.2	2.4	0.4
Fratton Suburban Centre	2.5	3.5	0.3	3.2	0.6
Gunwharf Quays	0.9	1.3	0.1	1.2	0.3
North End/London Road Suburban Centre	2.9	3.8	0.3	3.5	0.6
Southsea Town Centre	9.8	13.3	1.1	12.2	2.4
Out of Centre Retail Parks	145.0	197.1	15.9	181.2	36.2
All other local centres/stores	1.9	2.6	0.2	2.4	0.5

Notes:

(1) We assume that comparison goods retail floorspace (incl. non-bulky goods) will achieve real sales productivity gains of 1.5% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 13A : Non-Bulky Comparison Goods Floorspace Need in Portsmouth City, 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2011 (£m)	Adjustment for Over/Under Trading in Base Year (£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 12A Col. E]		[C = A - B]	[From Table 6A Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	48.4	0.0	48.4	154.5	202.8	6,104	33,230
Cosham Suburban Centre	1.0	0.0	1.0	-3.8	-2.8	3,052	-922
Fratton Suburban Centre	0.3	0.6	-0.3	-7.2	-7.5	3,052	-2,455
Gunwharf Quays	7.7	28.9	-21.2	1.6	-19.6	6,659	-2,937
North End/London Road Suburban Centre	1.3	0.0	1.3	-12.9	-11.6	3,052	-3,807
Southsea Town Centre	5.3	1.0	4.3	-6.6	-2.3	3,052	-752
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	0.5	17.0	-16.5	0.0	-16.5	3,052	-5,392
Total					142.6		16,966

Notes:

(1) There are a range of non-bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4B, together with our estimates for their 2004 non-bulky comparison goods turnovers. Turnovers for 2011 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £5,500 per sq m in the base year of 2004 (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2011. For the Suburban Centres, we have assumed the benchmark sales density of £2,750 per sq m in the base year apart from Gunwharf Quays which we assumed to be £6,000 per sq m (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2011. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,750 in 2004, grossed up by 1.5% p.a. through to 2011.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 13B : Bulky Comparison Goods Floorspace Need in Portsmouth City, 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2011 (£m)	Adjustment for Over/Under Trading in Base Year (£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 12B Col. E]		[C = A - B]	[From Table 6B Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	12.8	0.0	12.8	35.2	48.0	4,439	10,810
Cosham Suburban Centre	0.4	0.0	0.4	0.0	0.5	2,220	212
Fratton Suburban Centre	0.6	0.0	0.6	0.9	1.5	2,220	689
Gunwharf Quays	0.3	0.0	0.3	0.1	0.4	2,220	170
North End/London Road Suburban Centre	0.6	0.0	0.6	-6.2	-5.6	2,220	-2,503
Southsea Town Centre	2.4	0.0	2.4	1.2	3.6	2,220	1,625
Out of Centre Retail Parks	36.2	30.5	5.7	61.4	67.0	2,544	26,355
All other local centres/stores	0.5	0.0	0.5	0.0	0.5	2,220	212
Total					115.9		37,569

Notes:

(1) There are a range of bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4C, together with our estimates for their 2004 bulky comparison goods turnovers. Turnovers for 2011 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £4,000 per sq m in the base year of 2004 (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2011. For the Suburban Centres, we have assumed the benchmark sales density of £2,000 per sq m in the base year (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2011. For out of centre retail, we have assumed the benchmark sales density of £2,292 per sq m in 2004 (see Col. F, Table 6B) grossed up by 1.5% p.a. through to 2011. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,000 in 2004, grossed up by 1.5% p.a. through to 2011.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 14A : Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£million)

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Non-Bulky Comparison Goods Turnover	
	<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>	(Zones 1 - 17)			
Within the District																					
Portsmouth City Centre	7.8	14.1	0.5	2.2	11.6	51.3	45.5	12.8	97.3	83.5	62.5	33.8	16.8	5.2	15.4	23.2	25.8	509.4	50.9	560.4	
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.4	2.4	0.0	0.0	0.0	0.0	0.3	9.1	0.6	0.0	0.0	0.0	0.0	12.7	0.0	12.7	
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	2.7	
Gunwharf Quays	4.0	0.7	0.0	1.6	1.8	4.3	3.5	1.5	23.1	3.3	7.0	3.7	2.6	2.3	0.9	2.9	5.9	69.1	17.3	86.4	
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	13.6	0.0	0.0	0.0	0.0	0.0	0.0	13.6	0.0	13.6	
Southsea Town Centre	1.2	2.3	0.0	0.3	0.7	1.6	2.7	1.3	24.7	3.3	1.7	6.3	1.5	0.4	1.7	0.0	1.4	50.9	7.6	58.5	
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	
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.0	5.3	
Outside the District																					
Chichester	60.7	68.2	16.2	38.5	8.4	16.3	44.2	15.9	5.8	1.7	1.9	8.6	2.4	0.6	2.4	0.6	1.7	293.9			
Fareham	0.0	0.0	0.0	0.0	0.9	9.6	3.2	0.0	0.0	0.8	0.0	10.9	58.2	14.6	72.5	68.8	18.7	258.2			
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	14.8	42.0	57.1			
Havant	0.1	0.8	0.0	1.0	0.1	7.1	21.5	3.9	0.0	0.0	0.0	1.3	0.0	0.0	0.8	0.0	0.0	36.6			
Hedge End	0.2	1.5	0.0	0.7	1.3	2.0	0.0	1.9	0.0	0.7	0.5	3.9	1.0	11.1	8.9	1.4	0.7	35.9			
Southampton	1.6	1.7	0.0	2.0	4.4	10.6	5.6	1.8	21.2	5.0	2.7	7.4	6.5	38.1	42.1	18.8	13.1	182.6			
Waterlooville	0.0	0.8	0.0	0.0	4.4	86.6	2.1	0.2	0.0	0.0	0.6	4.4	0.5	0.0	0.0	1.0	0.0	100.7			
All other centres/stores	33.1	28.4	11.7	4.5	32.4	4.7	5.5	4.6	14.8	2.8	5.6	7.0	9.2	24.5	12.2	11.9	5.9	218.9			
Total Available Expenditure (from Table 4A)	108.86	118.54	28.35	50.80	66.37	196.37	133.80	44.04	192.74	103.23	96.51	96.37	99.28	97.01	157.01	143.32	115.14	1,847.74			

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available non-bulky comparison goods expenditure in the zone (Table 4a) by the 2004 non-bulky comparison goods market share of the specified centre in that zone (Table 7a).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

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

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Bulky Comparison Goods Turnover
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	3.8	5.4	0.0	0.3	1.9	9.1	6.2	1.9	19.2	15.2	5.3	7.6	1.2	0.0	1.5	0.0	0.6	79.2	7.9	87.1
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	3.2	0.0	3.2
Fratton Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.6	3.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	4.3	0.0	4.3
Gunwharf Quays	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.6	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.3	1.6
North End/London Road Suburban Centre	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.7	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.0	4.8
Southsea Town Centre	2.0	1.5	0.0	1.1	0.9	0.0	0.7	0.7	2.6	0.4	0.5	2.8	0.0	0.0	1.1	0.0	0.0	14.4	2.2	16.6
Out of Centre Retail Parks	0.0	1.1	0.1	0.6	4.0	16.7	18.0	8.1	69.6	37.2	50.8	32.5	5.6	0.0	1.5	0.0	0.8	246.5	0.0	246.5
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.7	1.0	0.0	0.0	0.0	0.0	3.3	0.0	3.3
Outside the District																				
Chichester	37.3	47.8	9.6	21.1	3.2	0.0	1.5	2.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	124.3		
Fareham	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	1.8	30.9	3.3	34.2	56.1	40.1	167.0		
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	0.0	0.0	1.5	5.0	14.3	21.0		
Havant	0.7	1.0	0.4	4.1	7.2	34.4	45.1	4.8	0.6	0.0	0.0	1.0	4.2	0.0	7.3	0.7	0.0	111.5		
Hedge End	0.7	0.7	0.0	0.0	1.9	5.7	0.0	0.2	4.0	0.0	0.5	4.1	2.3	49.0	23.5	16.5	6.5	115.4		
Southampton	1.4	0.7	0.0	0.4	1.7	4.7	1.1	0.9	1.9	0.0	0.0	2.6	1.8	3.8	4.5	2.9	0.0	28.2		
Waterlooville	0.0	1.2	0.5	1.2	5.6	46.3	2.3	0.2	0.5	0.4	0.0	1.8	0.0	0.0	0.0	0.0	0.0	60.0		
All other centres/Stores	22.1	13.8	7.1	3.0	14.3	0.6	3.1	7.0	15.0	3.7	0.5	2.8	14.4	3.6	20.7	6.4	6.3	144.3		
Total Available Expenditure (from Table 4B)	67.86	73.24	17.58	31.78	41.08	120.30	81.01	27.35	116.35	60.48	58.74	59.02	61.36	59.60	95.72	87.57	69.54	1,128.59		

Notes:

For each cell, the monetary figure is derived by multiplying the 2016 available bulky comparison goods expenditure in the zone (Table 4b) by the 2004 bulky comparison goods market share of the specified Centre in that zone (Table 7b).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 15A : Calculation of Potential Non-Bulky Comparison Goods 'Headroom' Expenditure for Portsmouth City, 2016 (£ million)

Centre	2004 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C	D	E
	<i>[[from Table 6a Col.C]</i>	<i>[[from Table 14a]</i>	<i>[see Note ⁽¹⁾]</i>	<i>[D = B - C]</i>	<i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	391.0	560.4	76.5	483.9	92.9
Cosham Suburban Centre	8.9	12.7	1.8	10.9	2.0
Fratton Suburban Centre	1.9	2.7	0.4	2.4	0.5
Gunwharf Quays	60.2	86.4	11.8	74.6	14.4
North End/London Road Suburban Centre	9.3	13.6	1.8	11.8	2.5
Southsea Town Centre	40.7	58.5	8.0	50.6	9.9
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	3.6	5.3	0.7	4.6	0.9

Notes:

(1) We assume that comparison goods retail floorspace (incl. non-bulky goods) will achieve real sales productivity gains of 1.5% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 15B : Calculation of Potential Bulky Comparison Goods 'Headroom' Expenditure for Portsmouth City, 2016 (£ million)

Centre	2004 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C	D	E
	<i>[from Table 6b Col.C]</i>	<i>[from Table 14b]</i>	<i>[see Note (1)]</i>	<i>[D = B - C]</i>	<i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	51.2	87.1	10.0	77.1	25.9
Cosham Suburban Centre	1.9	3.2	0.4	2.8	0.9
Fratton Suburban Centre	2.5	4.3	0.5	3.8	1.3
Gunwharf Quays	0.9	1.6	0.2	1.4	0.5
North End/London Road Suburban Centre	2.9	4.8	0.6	4.2	1.3
Southsea Town Centre	9.8	16.6	1.9	14.7	4.9
Out of Centre Retail Parks	145.0	246.5	28.4	218.2	73.2
All other local centres/stores	1.9	3.3	0.4	2.9	0.9

Notes:

(1) We assume that comparison goods retail floorspace (incl. non-bulky goods) will achieve real sales productivity gains of 1.5% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 16A : Non-Bulky Comparison Goods Floorspace Need in Portsmouth City, 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2016 (£m)	Adjustment for Over/Under Trading in Base Year (£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 15A Col. E]		[C = A - B]	[From Table 6A Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	92.9	0.0	92.9	154.5	247.4	6,576	37,621
Cosham Suburban Centre	2.0	0.0	2.0	-3.8	-1.8	3,288	-548
Fratton Suburban Centre	0.5	0.6	-0.1	-7.2	-7.3	3,288	-2,220
Gunwharf Quays	14.4	31.1	-16.7	1.6	-15.1	7,174	-2,101
North End/London Road Suburban Centre	2.5	0.0	2.5	-12.9	-10.4	3,288	-3,161
Southsea Town Centre	9.9	1.1	8.8	-6.6	2.2	3,288	675
Out of Centre Retail Parks	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All other local centres/stores	0.9	18.3	-17.4	0.0	-17.4	3,288	-5,279
Total					197.7		24,986

Notes:

(1) There are a range of non-bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4B, together with our estimates for their 2004 non-bulky comparison goods turnovers. Turnovers for 2016 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £5,500 per sq m in the base year of 2004 (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2016. For the Suburban Centres, we have assumed the benchmark sales density of £2,750 per sq m in the base year apart from Gunwharf Quays which we assumed to be £6,000 per sq m (see Col. F, Table 6A), grossed up by 1.5% p.a. through to 2016. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,750 in 2004, grossed up by 1.5% p.a. through to 2016.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Comparison Goods

Table 16B : Bulky Comparison Goods Floorspace Need in Portsmouth City, 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2016 (£m)	Adjustment for Over/Under Trading in Base Year	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 15B Col. E]		[C = A - B]	[From Table 6B Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	25.9	0.0	25.9	35.2	61.1	4,782	12,772
Cosham Suburban Centre	0.9	0.0	0.9	0.0	1.0	2,391	398
Fratton Suburban Centre	1.3	0.0	1.3	0.9	2.2	2,391	914
Gunwharf Quays	0.5	0.0	0.5	0.1	0.6	2,391	261
North End/London Road Suburban Centre	1.3	0.0	1.3	-6.2	-4.9	2,391	-2,046
Southsea Town Centre	4.9	0.0	4.9	1.2	6.1	2,391	2,545
Out of Centre Retail Parks	73.2	32.9	40.3	61.4	101.7	2,740	37,102
All other local centres/stores	0.9	0.0	0.9	0.0	0.9	2,391	393
Total					168.6		52,339

Notes:

(1) There are a range of bulky comparison goods retail commitments within Portsmouth District. These are detailed in Appendix 4C, together with our estimates for their 2004 bulky comparison goods turnovers. Turnovers for 2016 are estimated by applying a real growth rate of 1.5% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £4,000 per sq m in the base year of 2004 (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2016. For the Suburban Centres, we have assumed the benchmark sales density of £2,000 per sq m in the base year (see Col. F, Table 6B), grossed up by 1.5% p.a. through to 2016. For out of centre retail, we have assumed the benchmark sales density of £2,292 per sq m in 2004 (see Col. F, Table 6B) grossed up by 1.5% p.a. through to 2016. Lastly, for other centres / stores we have assumed a benchmark sales density of £2,000 in 2004, grossed up by 1.5% p.a. through to 2016.

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Quantitative Retail Need Assessment : Convenience Goods

Table 1: Population Change by Zone

Zone	Population ⁽¹⁾			
	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	37,878	38,545	38,851	39,438
Zone 2 - Chichester	39,791	41,903	43,306	45,782
Zone 3 - Midhurst	9,436	9,829	10,085	10,513
Zone 4 - Southbourne	16,745	17,594	18,116	18,956
Zone 5 - Petersfield	21,661	22,456	23,088	24,112
Zone 6 - Waterlooville	72,858	74,083	75,483	77,954
Zone 7 - Havant	55,349	55,503	56,148	57,455
Zone 8 - Hayling Island	16,309	15,941	15,843	15,742
Zone 9 - Portsmouth & Southsea	67,710	70,433	72,069	74,146
Zone 10 - Fratton	44,145	45,543	46,657	48,592
Zone 11 - North End	37,294	38,594	39,519	41,216
Zone 12 - Cosham	40,056	40,800	41,462	42,837
Zone 13 - Fareham	37,389	37,735	37,995	38,688
Zone 14 - Bishops Waltham & Botley	30,980	32,620	33,661	35,488
Zone 15 - Locks Heath	54,356	55,996	57,130	59,154
Zone 16 - Stubbington	57,652	59,224	59,986	61,243
Zone 17 - Gosport	44,941	46,643	47,161	47,968
Total (All Zones)	684,550	703,442	716,560	739,284

Notes:

- ⁽¹⁾ Population estimates and forecasts for all zones through to 2016 produced by Experian Business Strategies (EBS).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

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

Zone	Expenditure Per Head (£) ⁽¹⁾				
	2003	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	1,746	1,756	1,799	1,876	1,962
Zone 2 - Chichester	1,630	1,640	1,679	1,751	1,831
Zone 3 - Midhurst	1,693	1,703	1,744	1,819	1,902
Zone 4 - Southbourne	1,624	1,634	1,673	1,745	1,825
Zone 5 - Petersfield	1,658	1,668	1,708	1,781	1,863
Zone 6 - Waterlooville	1,557	1,566	1,604	1,673	1,749
Zone 7 - Havant	1,532	1,541	1,579	1,646	1,721
Zone 8 - Hayling Island	1,738	1,748	1,791	1,867	1,953
Zone 9 - Portsmouth & Southsea	1,614	1,624	1,663	1,734	1,813
Zone 10 - Fratton	1,426	1,435	1,469	1,532	1,602
Zone 11 - North End	1,493	1,502	1,538	1,604	1,677
Zone 12 - Cosham	1,485	1,494	1,530	1,595	1,668
Zone 13 - Fareham	1,590	1,600	1,638	1,708	1,786
Zone 14 - Bishops Waltham & Botley	1,581	1,590	1,629	1,698	1,776
Zone 15 - Locks Heath	1,562	1,571	1,609	1,678	1,755
Zone 16 - Stubbington	1,500	1,509	1,546	1,611	1,685
Zone 17 - Gosport	1,520	1,529	1,566	1,633	1,708

Notes:

- ⁽¹⁾ A 2003 expenditure per head estimate was produced by EBS for each of the 17 zones comprising the Portsmouth household survey area. Expenditure per head has been projected forward to 2004 (the base year) and the forecast years of 2008, 2011 and 2016 by assuming the most appropriate of EBS' Expenditure Growth Forecasts. For 2004 and 2008, we apply EBS' Forecast for the period 2003-2008 of 0.6% p.a., whilst for 2011 and 2016, we apply EBS' forecast for the period 2003-2013 of 0.9% p.a.

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

Zone	Expenditure Per Head (£) ⁽¹⁾				
	2003	2004 (Base Year)	2008	2011	2016
Zone 1 - Selsey	1,730	1,741	1,783	1,859	1,944
Zone 2 - Chichester	1,615	1,625	1,664	1,735	1,815
Zone 3 - Midhurst	1,678	1,688	1,729	1,802	1,885
Zone 4 - Southbourne	1,609	1,619	1,658	1,729	1,808
Zone 5 - Petersfield	1,643	1,653	1,693	1,765	1,846
Zone 6 - Waterlooville	1,543	1,552	1,590	1,658	1,734
Zone 7 - Havant	1,518	1,527	1,564	1,631	1,706
Zone 8 - Hayling Island	1,722	1,733	1,775	1,850	1,935
Zone 9 - Portsmouth & Southsea	1,599	1,609	1,648	1,718	1,797
Zone 10 - Fratton	1,413	1,422	1,456	1,518	1,588
Zone 11 - North End	1,480	1,488	1,524	1,590	1,662
Zone 12 - Cosham	1,472	1,480	1,516	1,581	1,653
Zone 13 - Fareham	1,576	1,585	1,624	1,693	1,770
Zone 14 - Bishops Waltham & Botley	1,567	1,576	1,614	1,683	1,760
Zone 15 - Locks Heath	1,548	1,557	1,595	1,663	1,739
Zone 16 - Stubbington	1,487	1,495	1,532	1,597	1,670
Zone 17 - Gosport	1,506	1,515	1,552	1,618	1,692

Notes:

⁽¹⁾ Expenditure per head has been discounted by 0.9% (over the figures in Table 2) to exclude spending by Special Forms of Trading (SFT). This is the latest SFT estimate provided by EBS. We assume the proportion of convenience goods expenditure taken-up by SFT will remain constant through to 2016.

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Quantitative Retail Need Assessment : Convenience Goods

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

Zone	Total Available Expenditure (£m) ⁽¹⁾			
	Base Year	Forecast Years		
	2004	2008	2011	2016
Zone 1 - Selsey	65.9	68.7	72.2	76.7
Zone 2 - Chichester	64.7	69.7	75.2	83.1
Zone 3 - Midhurst	15.9	17.0	18.2	19.8
Zone 4 - Southbourne	27.1	29.2	31.3	34.3
Zone 5 - Petersfield	35.8	38.0	40.8	44.5
Zone 6 - Waterlooville	113.1	117.8	125.1	135.1
Zone 7 - Havant	84.5	86.8	91.6	98.0
Zone 8 - Hayling Island	28.3	28.3	29.3	30.5
Zone 9 - Portsmouth & Southsea	109.0	116.1	123.8	133.2
Zone 10 - Fratton	62.8	66.3	70.8	77.2
Zone 11 - North End	55.5	58.8	62.8	68.5
Zone 12 - Cosham	59.3	61.9	65.6	70.8
Zone 13 - Fareham	59.3	61.3	64.3	68.5
Zone 14 - Bishops Waltham & Botley	48.8	52.7	56.7	62.5
Zone 15 - Locks Heath	84.6	89.3	95.0	102.9
Zone 16 - Stubbington	86.2	90.7	95.8	102.3
Zone 17 - Gosport	68.1	72.4	76.3	81.2
Total (All Zones)	1,068.9	1,125.0	1,194.8	1,289.0

Notes:

- ⁽¹⁾ Expenditure totals were calculated as follows:
Population (Table 1) multiplied by consumer expenditure per head after making appropriate deductions for Special Forms of Trading (Table 3).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 5 : Estimated Convenience Goods Market Shares by Zone, 2004 (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
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botley	Locks Heath	Stubbington	Gosport
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	6.6	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	22.2	1.1	1.9	3.7	11.2	28.4	51.7	14.6	4.5
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.

Table 6 : Convenience Goods Retail Expenditure Pattern and Centre Turnover Estimates, 2004 (£million)

Centre	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	Expenditure Drawn From Survey Area (Zones 1 - 17)	Estimated In-Flow Expenditure (£m)	Total Convenience Goods Turnover (£m)	Convenience Goods Floorspace (sq.m. net) ⁽¹⁾	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m. net) ⁽²⁾	Benchmark Convenience Goods Turnover (£m)	Extent of Any Over/Under Trading (£m)		
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botley	Locks Heath	Stubbington	Gosport	A	B	C=A+B	D	E=C/D	F	G=FxD	H=C-G		
Within the District																											
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	12.9	27.7	5.9	0.5	0.6	0.0	0.2	0.0	0.0	48.0	0.0	48.0	6,406	7,492	8,976	57.5	-9.5		
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	7.5	0.0	0.0	1.2	0.6	0.8	11.4	0.4	0.0	0.5	0.0	0.0	22.3	0.0	22.3	3,210	6,951	7,134	22.9	-0.6		
Fratton Suburban Centre	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	30.2	19.9	11.5	1.3	0.0	0.0	0.0	0.2	0.0	63.7	0.0	63.7	3,645	17,488	9,026	32.9	30.8		
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	262	4,158	5,800	1.5	-0.4		
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	16.5	0.0	0.0	0.0	0.0	0.0	0.0	20.6	0.0	20.6	4,366	4,716	6,413	28.0	-7.4		
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.7	0.0	10.7	2,665	4,006	8,218	21.9	-11.2		
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	9.7	2.4	1.2	13.6	7.7	12.3	35.8	10.2	0.0	1.3	0.1	0.0	94.2	0.0	94.2	8,287	11,366	9,195	76.2	18.0		
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.9	7.2	2.6	5.7	0.8	1.5	1.6	0.0	0.0	0.0	21.3	0.0	21.3							
Outside the District	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									
Chichester	53.7	63.0	5.4	20.5	0.0	0.0	2.9	1.0	0.0	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	147.2									
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	37.8	9.9	23.8	56.3	14.2	142.6									
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	2.1	0.0	1.8	14.5	50.8	69.2									
Havant	0.9	0.0	0.0	2.6	0.0	23.4	74.3	14.9	0.7	1.2	0.0	5.7	0.0	0.0	0.3	0.0	124.0										
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	22.8	13.0	1.7	37.7										
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	0.0	0.4	0.3	0.6	1.4										
Waterlooville	0.0	0.0	0.0	0.9	0.7	55.0	0.0	2.1	5.4	0.0	1.7	0.7	0.0	0.2	0.0	0.0	66.7										
All other centres/stores	11.3	1.0	10.6	3.1	35.0	16.3	5.0	8.0	24.2	0.7	1.1	2.2	6.6	13.9	43.8	12.6	3.1	198.3									
Total Available Expenditure (from Table 4)	65.9	64.7	15.9	27.1	35.8	113.1	84.5	28.3	109.0	62.8	55.5	59.3	59.3	48.8	84.6	86.2	68.1	1068.9									

Notes:

For each cell, the monetary figure is derived by multiplying the 2004 available retail expenditure in the zone (Table 4) by the 2004 market share of the specified centre in that zone (Table 5).

(1) Estimates derived from Goad Centre Category Reports and the latest IGD supermarkets database (See Appendix 3A).

(2) Colliers CRE estimates based on information in the UK Retail Rankings, 2004 (Mintel) (See Appendix 3A).

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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	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
	Selsey	Chichester	Midhurst	Southbourne	Petersfield	Waterlooville	Havant	Hayling Island	Portsmouth & Southsea	Fratton	North End	Cosham	Fareham	Bishops Waltham & Botley	Locks Heath	Stubbington	Gosport
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	6.6	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	0.3	0.0	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	22.2	1.1	1.9	3.7	11.2	28.4	51.7	14.6	4.5
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 the same as those set out in Table 5, because we do not consider there are material qualitative need arguments for making any adjustments.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 8 : Convenience Goods Retail Expenditure Pattern and Centre Turnover Estimates, 2008 (£million)

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Total Convenience Goods Turnover Potential
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	13.7	29.2	6.3	0.5	0.6	0.0	0.2	0.0	0.0	50.8	0.0	50.8
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	7.8	0.0	0.0	1.3	0.6	0.8	11.9	0.4	0.0	0.5	0.0	0.0	23.3	0.0	23.3
Fratton Suburban Centre	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	32.2	21.0	12.2	1.4	0.0	0.0	0.0	0.2	0.0	67.7	0.0	67.7
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	11.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.4	0.0	11.4
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	10.1	2.4	1.2	14.5	8.1	13.0	37.3	10.5	0.0	1.3	0.1	0.0	98.7	0.0	98.7
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.9	7.7	2.7	6.0	0.9	1.6	1.7	0.0	0.0	0.0	22.5	0.0	22.5
Outside the District	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		
Chichester	56.0	67.9	5.7	22.0	0.0	0.0	3.0	1.0	0.0	0.3	0.0	0.4	0.0	0.1	0.0	0.0	0.0	156.4		
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	39.1	10.6	25.1	59.2	15.1	149.8		
Gosport	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	0.0	1.9	15.2	54.0	73.3		
Havant	1.0	0.0	0.0	2.8	0.0	24.4	76.3	15.0	0.7	1.3	0.0	5.9	0.0	0.0	0.0	0.3	0.0	127.6		
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	24.6	13.8	1.8	0.0	40.3		
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	57.2	0.0	2.1	5.8	0.0	1.8	0.7	0.0	0.3	0.0	0.0	0.0	69.6		
All other centres/stores	11.8	1.1	11.3	3.3	37.1	17.0	5.1	8.0	25.8	0.7	1.1	2.3	6.9	15.0	46.2	13.2	3.3	209.1		
Total Available Expenditure (from Table 4)	68.7	69.7	17.0	29.2	38.0	117.8	86.8	28.3	116.1	66.3	58.8	61.9	61.3	52.7	89.3	90.7	72.4	1125.0		

Notes:
For each cell, the monetary figure is derived by multiplying the 2008 available convenience goods expenditure in the zone (Table 4) by the 2004 convenience goods market share of the specified centre in that zone (Table 7).

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Quantitative Retail Need Assessment : Convenience Goods

Table 9 : Calculation of Potential Convenience Goods 'Headroom' Expenditure in Portsmouth, 2008 (£ million)

Centre	2004 Turnover	2008 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2008	Residual Turnover Potential by 2008	Potential Headroom Expenditure by 2008
	A [[from Table 6 Col.C]	B [[from Table 8]	C [see Note ⁽¹⁾]	D [D = B - C]	E [E = D - A]
Within the District					
Portsmouth City Centre	48.0	50.8	1.5	49.4	1.4
Cosham Suburban Centre	22.3	23.3	0.7	22.6	0.3
Fratton Suburban Centre	63.7	67.7	1.9	65.7	2.0
Gunwharf	1.1	1.2	0.0	1.1	0.0
North End/London Road Suburban Centre	20.6	21.8	0.6	21.2	0.6
Southsea Town Centre	10.7	11.4	0.3	11.1	0.4
Major Out of Centre Superstores	94.2	98.7	2.9	95.8	1.6
All other local centres/stores	21.3	22.5	0.6	21.8	0.6

Notes:

(1) We assume that existing convenience goods retail floorspace will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 10: Quantitative Retail Floorspace Need in Portsmouth, 2008

Centre	Potential Headroom Expenditure by 2008 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2008 (£m)	Adjustment for Over/Under Trading in Base Year (£m)	Adjusted Residual Headroom Expenditure by 2008 (£m)	Assumed Sales Density in 2008 ⁽²⁾ (£ per sq m)	Estimated Retail Floorspace Need in 2008 (Sq M Net)
	A	B	C	D	E	F	G
	[From Table 9, Col. E]		[C = A - B]	[From Table 6, Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	1.4	0.0	1.4	-9.5	-8.1	9,248	-880
Cosham Suburban Centre	0.3	0.0	0.3	-0.6	-0.3	7,350	-36
Fratton Suburban Centre	2.0	0.0	2.0	30.8	32.8	9,300	3,529
Gunwharf	0.0	0.0	0.0	-0.4	-0.4	5,976	-66
North End/London Road Suburban Centre	0.6	0.0	0.6	-7.4	-6.8	6,608	-1,029
Southsea Town Centre	0.4	0.0	0.4	-11.2	-10.8	8,467	-1,281
Major Out of Centre Superstores	1.6	3.1	-1.5	18.0	16.5	9,474	1,745
All other local centres/stores	0.6	3.1	-2.5	0.0	-2.5	5,976	-423
Total					20.4		1,560

Notes:

(1) There are a range of convenience goods retail commitments within Portsmouth District. These are detailed in Appendix 4A, together with our estimates of their 2004 convenience goods turnovers. Turnovers for 2008 are estimated by applying a real growth rate of 0.75% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £8,976 per sq m in the base year of 2004 (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2008. For the Suburban Centres, we have assumed the benchmark sales density of £7,134 per sq m for Cosham, £9,026 per sq m for Fratton, £5,800 per sq m for Gunwharf, £6,413 per sq m for North End / London Road, £8,218 per sq m for Southsea, (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2008. For out of centre superstores, we have assumed the benchmark sales density of £9,195 per sq m in 2004 (see Col. F, Table 6) grossed up by 0.75% p.a. through to 2008. Lastly, for other local centres / stores, we have assumed £5,800 per sq m in 2004, grossed up by 0.75% p.a. through to 2008.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

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

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Total Convenience Goods Turnover Potential
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.1	14.6	31.2	6.7	0.5	0.6	0.0	0.2	0.0	0.0	54.2	0.0	54.2
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	8.3	0.0	0.0	1.4	0.6	0.9	12.7	0.4	0.0	0.6	0.0	0.0	24.7	0.0	24.7
Fratton Suburban Centre	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	34.3	22.5	13.1	1.4	0.0	0.0	0.0	0.2	0.0	72.2	0.0	72.2
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	18.7	0.0	0.0	0.0	0.0	0.0	0.0	23.3	0.0	23.3
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	10.8	2.6	1.3	15.5	8.6	13.9	39.5	11.1	0.0	1.4	0.1	0.0	104.7	0.0	104.7
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.9	8.2	2.9	6.4	0.9	1.7	1.8	0.0	0.0	0.0	24.0	0.0	24.0
Outside the District																				
Chichester	58.9	73.2	6.1	23.6	0.0	0.0	3.1	1.1	0.0	0.4	0.0	0.4	0.0	0.1	0.0	0.0	0.0	166.8		
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	41.0	11.4	26.7	62.6	16.0	158.4		
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	2.3	0.0	2.0	16.1	56.9	77.3		
Havant	1.0	0.0	0.0	3.0	0.0	25.9	80.5	15.5	0.7	1.3	0.0	6.3	0.0	0.0	0.0	0.3	0.0	134.6		
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	26.5	14.6	1.9	0.0	43.1		
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	0.8	60.8	0.0	2.1	6.2	0.0	1.9	0.7	0.0	0.3	0.0	0.0	0.0	74.0		
All other centres/Stores	12.3	1.2	12.1	3.6	39.8	18.0	5.4	8.3	27.5	0.8	1.2	2.4	7.2	16.1	49.1	14.0	3.4	222.5		
Total Available Expenditure (from Table 4)	72.2	75.2	18.2	31.3	40.8	125.1	91.6	29.3	123.8	70.8	62.8	65.6	64.3	56.7	95.0	95.8	76.3	1,194.78		

Notes:
For each cell, the monetary figure is derived by multiplying the 2011 available total Convenience goods expenditure in the zone (Table 4) by the 2004 total Convenience goods market share of the specified Centre in that zone (Table 7).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 12 : Calculation of Potential Convenience Goods 'Headroom' Expenditure in Portsmouth 2011 (£ million)

Centre	2004 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	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	48.0	54.2	2.6	51.7	3.7
Cosham Suburban Centre	22.3	24.7	1.2	23.5	1.2
Fratton Suburban Centre	63.7	72.2	3.4	68.8	5.0
Gunwharf	1.1	1.2	0.1	1.2	0.1
North End/London Road Suburban Centre	20.6	23.3	1.1	22.2	1.6
Southsea Town Centre	10.7	12.1	0.6	11.6	0.9
Major Out of Centre Superstores	94.2	104.7	5.1	99.7	5.5
All other local centres/stores	21.3	24.0	1.1	22.8	1.5

Notes:

(1) We assume that existing convenience goods retail floorspace will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 13 : Quantitative Retail Floorspace Need in Portsmouth 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2011 (£m)	Adjustment for Over/Under Trading in Base Year (£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]		[C = A - B]	[From Table 6, Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	3.7	0.0	3.7	-9.5	-5.8	9,458	-617
Cosham Suburban Centre	1.2	0.0	1.2	-0.6	0.6	7,517	86
Fratton Suburban Centre	5.0	0.0	5.0	30.8	35.9	9,511	3,773
Gunwharf	0.1	0.0	0.1	-0.4	-0.3	6,111	-56
North End/London Road Suburban Centre	1.6	0.0	1.6	-7.4	-5.8	6,757	-859
Southsea Town Centre	0.9	0.0	0.9	-11.2	-10.3	8,659	-1,194
Major Out of Centre Superstores	5.5	3.2	2.3	18.0	20.3	9,689	2,096
All other local centres/stores	1.5	3.2	-1.6	0.0	-1.6	6,111	-267
Total					32.9		2,963

Notes:

(1) There are a range of convenience goods retail commitments within Portsmouth District. These are detailed in Appendix 4A, together with our estimates of their 2004 convenience goods turnovers. Turnovers for 2011 are estimated by applying a real growth rate of 0.75% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £8,976 per sq m in the base year of 2004 (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2011. For the Suburban Centres, we have assumed the benchmark sales density of £7,134 per sq m for Cosham, £9,026 per sq m for Fratton, £5,800 per sq m for Gunwharf, £6,413 per sq m for North End / London Road, £8,218 per sq m for Southsea, (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2011. For out of centre superstores, we have assumed the benchmark sales density of £9,195 per sq m in 2004 (see Col. F, Table 6) grossed up by 0.75% p.a. through to 2011. Lastly, for other local centres / stores, we have assumed £5,800 per sq m in 2004, grossed up by 0.75% p.a. through to 2011.

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

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

Centre	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	Expenditure Drawn From Survey Area	Estimated In-Flow Expenditure	Total Convenience Goods Turnover Potential
	<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>	(Zones 1 - 17)		
Within the District																				
Portsmouth City Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.1	15.7	34.0	7.3	0.6	0.7	0.0	0.2	0.0	0.0	58.9	0.0	58.9
Cosham Suburban Centre	0.0	0.0	0.0	0.0	0.0	8.9	0.0	0.0	1.5	0.7	1.0	13.7	0.4	0.0	0.6	0.0	0.0	26.7	0.0	26.7
Fratton Suburban Centre	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	36.9	24.5	14.3	1.6	0.0	0.0	0.0	0.2	0.0	78.2	0.0	78.2
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	2.3	2.7	20.4	0.0	0.0	0.0	0.0	0.0	0.0	25.4	0.0	25.4
Southsea Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.1	0.0	13.1
Major Out of Centre Superstores	0.0	0.0	0.0	0.0	0.0	11.6	2.7	1.3	16.7	9.4	15.1	42.7	11.8	0.0	1.5	0.1	0.0	113.1	0.0	113.1
All other local centres/stores	0.0	0.0	0.0	0.0	0.0	1.2	0.0	1.0	8.8	3.2	7.0	1.0	1.8	2.0	0.0	0.0	0.0	25.9	0.0	25.9
Outside the District	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
Chichester	62.5	80.9	6.7	25.9	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	181.3		
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	43.7	12.6	28.9	66.8	17.0	169.7		
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	2.5	0.0	2.2	17.2	60.6	82.4		
Havant	1.1	0.0	0.0	3.3	0.0	28.0	86.1	16.1	0.8	1.5	0.0	6.8	0.0	0.0	0.0	0.3	0.0	144.0		
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	29.2	15.8	2.0	0.0	47.2		
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	0.4	0.7	0.0	1.7		
Waterlooville	0.0	0.0	0.0	1.2	0.8	65.7	0.0	2.2	6.7	0.0	2.1	0.8	0.0	0.3	0.0	0.0	0.0	79.8		
All other centres/Stores	13.1	1.3	13.1	3.9	43.5	19.5	5.8	8.7	29.6	0.8	1.3	2.6	7.7	17.7	53.2	14.9	3.7	240.4		
Total Available Expenditure (from Table 4)	76.7	83.1	19.8	34.3	44.5	135.1	98.0	30.5	133.2	77.2	68.5	70.8	68.5	62.5	102.9	102.3	81.2	1,289.01		

Notes:
For each cell, the monetary figure is derived by multiplying the 2016 available total Convenience goods expenditure in the zone (Table 4) by the 2004 total Convenience goods market share of the specified Centre in that zone (Table 7).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 15 : Calculation of Potential Convenience Goods 'Headroom' Expenditure in Portsmouth 2016 (£ million)

Centre	2004 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2004-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C	D	E
	<i>[from Table 6 Col.C]</i>	<i>[from Table 14]</i>	<i>[see Note ⁽¹⁾]</i>	<i>[D = B - C]</i>	<i>[E = D - A]</i>
<u>Within the District</u>					
Portsmouth City Centre	48.0	58.9	4.5	54.4	6.4
Cosham Suburban Centre	22.3	26.7	2.1	24.6	2.3
Fratton Suburban Centre	63.7	78.2	6.0	72.2	8.5
Gunwharf	1.1	1.3	0.1	1.2	0.1
North End/London Road Suburban Centre	20.6	25.4	1.9	23.5	2.9
Southsea Town Centre	10.7	13.1	1.0	12.1	1.4
Major Out of Centre Superstores	94.2	113.1	8.8	104.2	10.0
All other local centres/stores	21.3	25.9	2.0	23.9	2.6

Notes:

(1) We assume that existing convenience goods retail floorspace will achieve a real sales productivity gain of 0.75% per annum. This figure is based on the latest published research by EBS (See Appendix 5E).

PORTSMOUTH RETAIL STUDY
Quantitative Retail Need Assessment : Convenience Goods

Table 16 : Quantitative Retail Floorspace Need in Portsmouth 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Retail Commitments ⁽¹⁾ (£m)	Residual Headroom Expenditure Available to Support Additional Retail Floorspace by 2016 (£m)	Adjustment for Over/Under Trading in Base Year (£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]		[C = A - B]	[From Table 6, Col. H]	[E = C + D]		[G = E / F]
Within the District							
Portsmouth City Centre	6.4	0.0	6.4	-9.5	-3.1	9,818	-319
Cosham Suburban Centre	2.3	0.0	2.3	-0.6	1.7	7,803	223
Fratton Suburban Centre	8.5	0.0	8.5	30.8	39.3	9,873	3,984
Gunwharf	0.1	0.0	0.1	-0.4	-0.3	6,344	-46
North End/London Road Suburban Centre	2.9	0.0	2.9	-7.4	-4.5	7,015	-648
Southsea Town Centre	1.4	0.0	1.4	-11.2	-9.8	8,989	-1,095
Major Out of Centre Superstores	10.0	3.3	6.7	18.0	24.7	10,058	2,459
All other local centres/stores	2.6	3.3	-0.7	0.0	-0.7	6,344	-103
Total					47.3		4,455

Notes:

(1) There are a range of convenience goods retail commitments within Portsmouth District. These are detailed in Appendix 4A, together with our estimates of their 2004 convenience goods turnovers. Turnovers for 2016 are estimated by applying a real growth rate of 0.75% p.a. to the 2004 turnover figures.

(2) For Portsmouth City Centre we have assumed the benchmark sales density of £8,976 per sq m in the base year of 2004 (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2016. For the Suburban Centres, we have assumed the benchmark sales density of £7,134 per sq m for Cosham, £9,026 per sq m for Fratton, £5,800 per sq m for Gunwharf, £6,413 per sq m for North End / London Road, £8,218 per sq m for Southsea, (see Col. F, Table 6), grossed up by 0.75% p.a. through to 2016. For out of centre superstores, we have assumed the benchmark sales density of £9,195 per sq m in 2004 (see Col. F, Table 6) grossed up by 0.75% p.a. through to 2016. Lastly, for other local centres / stores, we have assumed £5,800 per sq m in 2004, grossed up by 0.75% p.a. through to 2016.