Report

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Gosport Retail Capacity Study 2014

Gosport Borough Council

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GOSPORT
Borough Council

gva.co.uk

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For and on behalf of GVA Grimley Ltd

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1. Introduction

1.1 GVA have been instructed by Gosport Borough Council to undertake a Retail Capacity Study which assesses the need and demand for new retail floorspace in the Borough up to 2029 to inform the emerging Local Plan. This study is informed by and builds upon Council's previous Retail Study (2007) and Partial Update (2011) which were also undertaken by GVA.

1.2 Our terms of reference are to:

- Update retail capacity forecasts in the Borough up to 2029 for convenience, bulky and non-bulky floorspace in the periods of 2011-2016, 2017-2022 and 2023-2029;
- Review and advise on the retail performance of Gosport, Stoke Road and Lee-on-the-Solent to advise on the respective strengths and weaknesses of each centre and their capacity to accommodate additional growth;
- Based on the results of the updated quantitative assessment and the health checks of the existing centres, advise on the level and type of development which will be appropriate to the Borough over the plan period taking into account national, and local economic trends and planning policies.

1.3 In addition to on-site and desk-based evidence gathering, this report is informed by a partial refresh of the Household Telephone Survey data for four survey zones (see Plan 1), the results of which provide an up-to-date picture of shopping patterns across the Borough.

Structure

1.4 This report is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail planning in Gosport.
- **Section 3** provides an overview of current national economic trends influencing town centres and retailing, including the role of the internet.

- **Sections 4 and 5** present our qualitative assessment of Gosport Town Centre and the two District Centres of Stoke Road and Lee-on-the-Solent respectively, highlighting key changes since the 2007 Retail Study.
- **Section 6** sets out the global quantitative capacity forecasts for new retail provision within the Borough.
- **Section 7** summarises our findings and advises on the level and type of development which will be appropriate to the Borough over the plan period.

2. Policy Framework

2.1 In this section we examine the key features of national and local planning policy guidance provides the context and framework for this study.

National Policy

The National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF) was published on 27 March 2012 and sets out the Government's planning policies for England. It replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the NPPF is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The NPPF encourages Local Planning Authorities (LPAs) to positively seek opportunities to meet the development needs of their area.

2.4 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each LPA should produce a single Local Plan for its area with any additions DPDs or SPDs to be used only where clearly justified.

2.5 The NPPF maintains the general thrust of PPS4. It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;

- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

2.6 The NPPF requires Local Plans to be aspirational but realistic. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where.

2.7 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;

- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

National Planning Policy Guidance (online)

2.8 On 6 March 2014 the Department for Communities and Local Government (DCLG) launched the online planning policy guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses.

2.9 The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres. This strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. They should consider:

- The appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three five year period, but also take the lifetime of the Local Plan into account and be reviewed regularly;
- The most appropriate mix of uses in the centre to enhance overall vitality and viability;
- The potential to expand centres or enable new development or redevelopment of under-utilised spaces to accommodate the scale of need identified for main town centre uses. This should involve evaluating different policy options (for example, expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change;
- Appropriate timeframes for provision of new retail floorspace;
- Complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and

- How car parking provision can be enhanced and both parking charges and enforcement be made proportionate in order to encourage town centre vitality.

2.10 The NPPG also sets out a range of indicators relevant when assessing the health of town centres over time. These include:

- Diversity of uses
- Proportion of vacant street level property
- Commercial yields on non-domestic property;
- Customer views and behaviour;
- Retailer representation and intentions to change representation;
- Commercial Rents
- Pedestrian flows;
- Accessibility;
- Perceptions of safety and occurrence of crime; and
- State of town centre environmental quality.

2.11 When planning for town centres, LPAs should take full account of relevant market signals and keep retail land allocations under regular review. Where it is not possible or appropriate to accommodate identified capacity in town centre locations, LPAs should plan positively to identify the most appropriate alternative strategy for meeting the need for these main town centre uses, having regard to the sequential and impact tests.

2.12 When applying the sequential approach in plan-making, LPAs should take into account the need for main town centre uses, the supply and demand for land, and whether there are sites which are suitable, available and viable having regard to the nature of the need that is to be addressed. If main town centre uses cannot be accommodated in town centre sites, the next sequentially preferable sites should be considered. Local Plans should contain policies to apply the sequential test to proposals for main town centre uses that may come forward outside identified sites or locations allocated in the Local Plan.

Regional Policy

2.13 The Partnership for Urban South Hampshire (PUSH) is dedicated to delivering sustainable, economic-led growth and regeneration to create a more prosperous, attractive and sustainable South Hampshire, offering a better quality of life for everyone who lives, works and spends their leisure time the area. It is a partnership of Hampshire County Council; the Unitary Authorities of Portsmouth, Southampton and Isle of Wight; and District Authorities of Eastleigh, East Hampshire, Fareham, Gosport, Havant, New Forest, Test Valley and Winchester.

2.14 PUSH works with its partners to support the delivery of transformational programmes that focus on better outcomes for local people. PUSH has two overarching strategies – an Economic Development Strategy and a spatial strategy called the 'South Hampshire Strategy'. Both strategies seek a step change in South Hampshire's economic growth in a managed, sustainable way, with growth shared by all communities. Although these do not form part of the adopted Development Plan for Gosport, PUSH strategies will influence decision-taking and plan-making in the region.

PUSH Economic Development Strategy (October 2010)

2.15 The Economic Development Strategy was adopted in 2010 and sets out the context for economic growth in the region. It sets out the foundations of change necessary to achieve a brighter economic future for South Hampshire. The strategy and its evidence base were updated during 2009/10 by DTZ and Oxford Economics (OE) and following consultation, the updated Economic Development Strategy was approved by the PUSH Joint Committee in November 2010. It sets out an up-to-date assessment of both employment floorspace and housebuilding requirements across South Hampshire as a whole.

PUSH South Hampshire Strategy (October 2012)

2.16 The South Hampshire Strategy translates the key elements of the Economic Development Strategy into a spatial strategy, and also covers other topics such as culture and environmental sustainability. The document focuses on issues which require a strategic approach and seeks to deliver forecast requirements set out in the Economic Development Strategy. The document's policies and proposals will help maximise economic growth, help bring about a renaissance of Portsmouth, Southampton and other urban areas, and help ensure affordable family home and good quality jobs for all.

2.17 PUSH Authorities are currently preparing a review of the Strategy to 2036, which will incorporate the most recent South Hampshire Strategic Housing Market Assessment (SHMA) and include consideration of the availability of land that can sustainably accommodate development, environmental constraints and impacts, economic development and employment analysis, along with infrastructure capacity and consideration of what new infrastructure might be needed.

Solent LEP - Transforming Solent: Solent Strategic Economic Plan 2014-2020 (March 2014)

2.18 The Solent area Growth Plan was adopted in March 2014 and seeks to build on the areas' strengths, harnesses the drivers for growth and addresses the barriers, which if not addressed, could hinder growth in the Solent region.

2.19 The new investment strategy brings together:

- Local assets to unlock resources to be reinvested in growth;
- The Solent LEP European Union Structural and Investment Fund Strategy - valued at £78m including private and public sector match funding; and
- A Local Growth Deal proposal valued at £1.85 bn, including £102m of local public funding and £1.43 bn private sector leverage.

2.20 Developed through extensive consultation with PUSH and other local partners, the ambitious plan seeks to focus on parts of the local economy that need to develop or change the most to accelerate growth. A key objective identified in the Solent Local Growth Plan is to unlock critical employment sites and enable new housing to support a growing workforce. The Plan identifies 24,000 new homes as a target by 2020.

Local Policy

Gosport Borough Local Plan Review (Adopted May 2006)

2.21 The Local Plan Review was adopted in May 2006 and relevant policies were saved by the Secretary of State in 2009. The Saved Policies of the Local Plan Review constitute the adopted development framework in Gosport until they are replaced by the emerging Local Development Framework.

2.22 The Local Plan Review provides detailed policies to guide day to day planning decisions in the Borough for the period up to 2016. Town Centres are considered to perform a valuable role and their future prosperity is vital to the economic regeneration of the Borough. Gosport is identified as a Principal Town Centre in the Borough, followed by the two District Centres of Stoke Road and Lee-on-the-Solent, five Local Centres and 17 Neighbourhood Centres. The Council seeks to maintain and improve shopping and related commercial facilities.

2.23 The key aims of the plan are to:

- Establish and maintain a retail hierarchy with a range of facilities to meet the requirements of shoppers throughout the Borough;
- Maintain Gosport Town Centre as the main centre in the Borough with policies that seek to provide mixed-use developments that enhance retail, commercial and leisure facilities;
- Safeguard and strengthen local centres to cater for day-to-day shopping and community needs;
- Promote and maintain an appropriate balance between retail and non-retail uses;
- Ensure that new shopping development complements and enhances existing shopping provision in locations that are accessible by a range of transport modes; and
- Continue to implement a programme of environmental improvements to upgrade the quality and attractiveness of shopping centres.

2.24 Various sites are identified for retail related development in the Borough including a new neighbourhood centre at Cherque Farm (now completed and in use), the redevelopment of Gosport bus station and mixed-use schemes at Royal Clarence Yard and Coldharbour.

2.25 The plan states that Gosport town centre, Stoke Road and Lee-on-the-Solent should remain the prime focus for new retail and service development to ensure their viability and vitality. In order to protect the role of these centres, the plan states that no more than 33% of commercial units may comprise uses other than Class A1 and A2.

2.26 In Lee-on-the-Solent, the plan seeks to maintain commercial uses along the seafront in the Marine Parade Area of Special Character. Visitors to this area provide a valuable contribution to the local economy and add to the vitality of Lee-on-the-Solent District Centre. Changes of uses or redevelopment of properties from commercial and leisure/recreation uses will only be permitted provided that they are vacant and there have been reasonable attempts to sell/let the property for commercial use.

2.27 After Gosport and the District Centres, local and neighbourhood centres are the preferred location for retail development. In these locations a threshold of 40% is used to control the number of non-A1 uses to ensure that proposals do not prejudice their retail function.

2.28 The plan recognises that local shops outside of designated centres are important for serving local community needs. However, it notes that should these shops be no longer required, then a change to non-retail uses would be acceptable in principle, subject to various criteria and other local plan policies.

Gosport Borough Local Plan, 2011-2029 (Draft December 2012)

2.29 The Council is currently in the process of producing a Local Plan which will set out the Council's planning strategy, proposed site allocations and detailed development management policies for the Borough over the period to 2029. The latest version of the plans (December 2012) was subject to extensive public consultation and there are likely to be a revisions to be made at the Publication stage.

2.30 Upon adoption, the Local Plan will replace the 'saved' policies of the existing Local Plan Review (2006) and form a key part of the statutory development plan. The Council has decided in conformity with the NPPF to prepare an overarching Local Plan rather than separate Core Strategy and Site Allocation & Delivery DPDs. The work on the draft Core Strategy has been incorporated into the emerging Local Plan

2.31 Policy LP3 of the emerging Local Plan sets out the proposed spatial strategy for the Borough between 2011 and 2029, which includes providing 84,000 sqm (net) of additional employment space, 2,700 net additional dwellings and around 10,500 sqm (net) of additional retail floorspace. Development proposals are directed to sites within the urban area. Gosport Town Centre is identified as the primary centre in the Borough and will be the focus for a range of town centre uses including retail, leisure, community services and office employment. The Local Plan aims to ensure that new opportunities to enhance retail and leisure facilities are taken in order to strengthen Gosport's market share in order to 'claw back' the significant leakage of expenditure from the Borough.

2.32 A number of Regeneration Areas are proposed, and the following two areas include scope for new retail development:

- Gosport Waterfront and Town Centre (mixed-use);
- Rowner (mixed-use residential led).

2.33 Policy LP4 identifies Gosport Waterfront and Town Centre as a prime location for regeneration within the South Hampshire sub region. It supports development of up to 10,500 sqm of retail (A1), additional main town centre and leisure uses (A2-A5, D1 and D1), as well as 33,000 sqm of employment floorspace, 700 -900 dwellings, a new transport interchange and enhanced public realm. After adoption of the Local Plan, further details on potential development sites will be expanded in a Gosport Waterfront and Town Centre SPD.

2.34 Elsewhere in the Borough, Policy LP7 supports creation of 2,250 sqm (net) of retail floorspace with an enhanced centre to support redevelopment of the Rowner Regeneration Area (also called Alver Village) for residential development. A new Tesco foodstore of around 1,828 sqm (net) has since opened on part of this site.

2.35 Policy LP27 sets out the retail hierarchy in the Borough. Gosport Town Centre is identified as a Principal Town Centre, followed by the two District Centres of Lee-on-the-Solent and Stoke Road, and 22 Neighbourhood Centres. Permission will be grated for proposals which create competitive centres and support their vitality and viability, including:

- Allowing a greater diversity of uses;
- Supporting markets in relevant centres;
- Enhancing the environment of centres; and
- Enhancing the evening economy of Gosport Town Centre, Lee-on-the-Solent and Stoke Road Centre.

2.36 Supporting text to Policy LP27 states that Local Plan will aim to build on Gosport Town Centre's strengths and assets by encouraging development of new retail, leisure, employment and community facilities. The Council will take a proactive approach to planning for new retail floorspace in the Borough in order to claw-back significant leakage of expenditure to larger neighbouring centres and where possible increase its market share in a realistic manner which is appropriate for its role within the sub regional retail hierarchy. Strengthening the linkages with the Gosport Waterfront will help to enhance the retail and service provision within the Town Centre, as well as improving the range of activities available to the local community.

2.37 In the District and Neighbourhood Centres, the Local Plan aims to ensure the continued vitality and viability of these centres including allowing new uses, small scale development which reflects the scale and nature of each specific centre and measures which will improve their accessibility and the quality of the public realm.

2.38 Policy LP28 safeguards the frontages of existing centres and states that only the following uses will be permitted:

- Within Primary Frontages of the Principal, District and Neighbourhood centres, A1 and A2 uses or A3, A4, A5, C1, D1, D2 or other appropriate town centre uses provided that these uses do not either individually or cumulatively exceed 33% of the total frontage;
- Within the Secondary frontage of the Stoke Road District Centre, A3, A4, A5, C1, D1 and D2 or other appropriate town centre uses provided that these uses do not either individually or cumulatively exceed 50% of the total frontage; and
- Within the Frontages of the Neighbourhood Centres, A3, A4, A5, D1 and other appropriate town centre uses provided that these do not either individually or cumulatively exceed 50% of the total frontage.

2.39 Proposals for residential development in appropriate locations within the Principal, District and Neighbourhood defined centres will be supported provided that:

- they are not within the ground floor frontage;
- they do not prevent the servicing of commercial and community units;
- they do not have a detrimental effect on adjoining uses; and
- a separate independent and appropriate access can be achieved to serve residential accommodation.

2.40 Policy LP29 states that proposals for retail and other main town centre uses outside of a centre will need to accord with Government guidance in relation to the sequential and impact tests.

Summary

- The National Planning Policy Framework (NPPF) was published in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF clearly advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.
- The Local Plan Review (2006) will remain the statutory development plan until it is replaced by the emerging Local Plan 2011-2029. Both the existing and emerging Local Plan identify Gosport at the top of the retail hierarchy, and aim to maintain it as the main centre in the Borough. The draft Local Plan aims to maintain and increase the market share retained by the town centre through provision of an additional 10,500 sqm (net) of retail floorspace in the Town Centre and Waterfront Area over the plan period. Additional retail development in other centres will be encouraged where it is appropriate to the scale and nature of each specific centre and supports their vitality and viability. The current study will inform the Publication version of the Local Plan and the quantum of retail floorspace which could be supported in the centre.

3. Retail Market Review and Town Centre Trends

3.1 To put our assessment into context and inform our advice on the need for additional retail floorspace in the study area, we have undertaken a review of the current retail market and social trends influencing the retail sector. Our review draws on published data sources, including research by Experian and Verdict.

3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

3.3 Advice published by Experian (Retail Planner 11, October 2013) identifies that the UK economy has continued to struggle following the recession as a result of weak domestic demand, declining disposable incomes, low levels of investment and reduced government spending. However, the economic outlook improved in 2013 and Experian expects that as inflation continues to ease steadily, and output and employment growth accelerate, household finances will gradually improve and retail spending growth will increase.

3.4 The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

Population Change

3.5 The rate at which the UK population is growing is accelerating. Between 1971 and 1991 it increased by just over 0.1% pa, whereas over the subsequent 20 years it increased by almost 0.5% pa. Over the next 10 years (2013-23) it is expected to increase by just over 0.7% pa, or 7.5% in total. This population growth will vary between regions over the next 10 years, with London expected to show the strongest growth (+12.5%), followed by the East and the East Midlands regions (+9.8%). This contrasts with growth of just 3.3% in the North East. Marked disparities can occur between local authorities within the same region, due to differences in housing demand, land availability and local policies.

3.6 Advances in healthcare and medicine mean that people are living much longer. It will therefore be increasingly important for Councils to ensure that older consumers are adequately catered for with the right type of facilities in the right locations. The proportion of the population aged over 65 is expected to increase from 17.5% of the total population in 2013 to 19.5% in 10 years' time, a growth rate of 20%, which is more than double the rate of total population growth (7.5%).

Retail Expenditure and Sales Efficiency

Retail Expenditure Growth

3.7 Comparison goods spending is expected to grow at a much higher rate than convenience goods spending over the plan period. For comparison goods, expenditure growth per head was 0.3% in 2011, increasing to 3.1% in 2012 and 3.2% in 2013 according to Experian. Between 2014 and 2023 annual average growth is expected to be around of 2.9% pa. For convenience goods, spending declined slightly between 2011 and 2013. However, Experian estimate a return to positive expenditure growth between 2014 and 2023 of around 0.8% pa, falling slightly to 0.7% pa post 2023.

3.8 To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

3.9 The popularity of online retailing grew rapidly between 2008 and 2012. Most retailers now have an online presence, thus it is expected that this growth will slow. It is, however, likely to continue outpacing growth in total retail sales each year from 2013 to 2018, rising from £33.7bn to £50.2bn, an overall increase of 49%[1].

3.10 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT), includes all types of non-store retailing (internet, markets and mail order) and in 2013 was equivalent to 11.5% of total retailing (14% for comparison goods and 7% for convenience goods). In 2018, Experian predict that non-store sales (SFT) will reach 17% of total retail, growing steadily until it plateaus at around 20% by 2026.

3.11 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, to account for this when calculating the effect of SFT on the need for retail floorspace, Experian recommend adjustments of 10.5% for comparison goods and 2.1% for convenience goods in 2012. These are forecast to rise to 14.5% and 3.8% respectively by 2018[2].

Sales Efficiency Growth

3.12 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.

3.13 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.

3.14 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to

[1] Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)
[2] Experian: Retail Planner Briefing Note 11, October 2013

increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2% pa between 2014 and 2030.

3.15 Scope for increased sales densities is even more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate of close to zero % pa between 2014 and 2030 is recommended by Experian and these assumptions inform our approach.

Internet Growth & Multichannel Retailing

3.16 The online shopping population is reaching saturation, with over 40m online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. According to Verdict, in most sectors the average spend per trip is 64.5% higher on a tablet than a laptop/PC[3].

3.17 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018[3]. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores.

3.18 The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases. According to Verdict, in 2012 61% of shoppers researched goods online before purchasing in store, and some 38% of customers researched goods in store before buying online.

3.19 These trends, combined with the importance of ‘click and collect’ highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom

[3] Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

Changing Retailer Requirements

Space Requirements

3.20 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.

3.21 During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.

3.22 The growth of the internet means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.

3.23 This polarisation of retailing will result in larger dominant centres continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local, or neighbourhood, centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day shopping. This changing retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.

Out-of-Centre Retailing

3.24 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

3.25 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operate a number of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

3.26 The town centre has been the main shopping channel for centuries. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.

3.27 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms and to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.

3.28 Enhancing the non-retail offer so towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.

3.29 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. Councils /town centre managers need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.

3.30 An important consideration for councils and town centre managers over the next few years will be that many retail leases are due to expire, which will enable retailers to easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.

3.31 Some of these trends have recently been identified and promoted by the Government in the Portas Review, the Government's Response to the Portas Review and a Government supported industry taskforce report.

Relevant Government Research

The Portas Review (December 2011)

3.32 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, largely in response to the far-reaching effects of the recession on the retail industry and local high streets in particular. The report, published in December 2011, suggests measures to tackle the further decline of the high street.

3.33 Amongst the 28 separate recommendations set out in the report, there is a call to strengthen policy in favour of 'town centres first'. This followed the publication of the draft NPPF. In summary the recommendations aim to:

- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- Level the playing field: by ensuring a strong town centre first approach in planning, introduce Secretary of State 'exceptional sign off' for out-of-town development

and encouraging large retailers to show their support for high streets by mentoring local businesses;

- Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas Review (March 2012)

3.34 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that they will run 24 'Portas Pilot' towns to set up Town Teams to create plans for the future of their high streets. In addition the Government will provide investment to help Business Improvement Districts (BIDs) access loans for their set-up costs and funding for a Future High Street X-Fund to reward towns which are delivering innovative plans to bring their town centres back to life. In its response, the Government also supports a National Market Day in June and plans to double small business rate relief. It also supports community involvement in the redesigning of high streets to reinvigorate areas of decline, increase footfall and encourage people to live in their town centres.

3.35 The Government did not support the call to introduce the suggested Secretary of State 'exceptional sign off' for all new out-of-town developments or require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

Understanding High Street Performance (December 2011)

3.36 The department for Business, Innovation and Skills (BIS) has also published a report which explores the many factors impacting on the economic and social performance of town centres and high streets. This study is intended to help inform government and local authority decision-making regarding town centres and high streets.

3.37 The study, based on a review of available research and literature on high streets, identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of factors which have stimulated and affected change on the high street:

- **Externalities** – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending;
- **Spatial and Physical Factors** – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets;
- **Market Forces** – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet;
- **Management** – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

3.38 The study also examines the responses to high street change which have been implemented to date. These include: town centre masterplanning and public realm improvements; differentiation and emphasising a distinctive retail offer; policy prioritisation and more developed place management (e.g. TCM and BIDs).

3.39 Moving forwards, the study anticipates that retail performance on the high street will become increasingly challenging. Town centres will continue to be effected by the growth in out-of-centre retail, supermarkets non-food sales, and the internet. The high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.

3.40 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered more vital.

Summary

- Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.

- It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping ‘experience’, maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres.
- The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

4. Qualitative Assessment – Gosport Town Centre

Methodology

4.1 This section will assess the health of Gosport town centre against a range of health check indicators set out in the NPPG, where information is available. The purpose will be to highlight the strengths and weaknesses of each centre to inform emerging policy and assist in the determination of planning applications.

4.2 The health check for Gosport will be principally informed by, *inter alia*:

- Town Centre audits for Gosport conducted by the Council between 2007 and 2014;
- The most recent Experian Goad Summary Report for Gosport (November 2012);
- The results of a bespoke household telephone survey (February 2014) undertaken by NEMS;
- Relevant policy documents; and
- Co-Star Focus Report of existing retailer requirements for Gosport Town Centre (March 2014).

Previous Studies

2007 Retail Study

4.3 Before assessing the current performance of Gosport Town Centre, we briefly review the findings of the 2007 Retail Study on Gosport town centre's health and capacity for growth. The 2007 study included a detailed health check of the town centre which found that it was healthy and performing well in a number of performance indicators. The centre was found to have a good range of convenience and service outlets and a relatively good variety of comparison retailers for a centre of its size and its position in the retail hierarchy. Vacancy levels in the centre were well below average. The market was also found to serve an important role as a visitor attraction in Gosport Town Centre. Non-retail uses such as the Discovery Centre and the Town Hall were found to contribute to the vitality of the centre creating footfall throughout the day.

4.4 The study identified 19 retail requirements in the centre in 2007, an increase in demand from the 10 requirements identified in 2001. Of these, two were from convenience operators, 13 from comparison operators and four from service operators. Examples of outstanding requirements at the time included Matalan, Shoe Zone, Savers, Poundland, Aldi and Pizza Hut. With the exception of Pizza Hut (which has opened a restaurant on Forton Road), these requirements appear to have been unfulfilled and published interest has since extinguished. This is not unusual and coincides with the economic downturn.

4.5 Despite these positive indicators, there were a number of factors which indicated potential signs of vulnerability and barriers to growth. A number of key attractors were found to be missing from the mix of retailers in the town centre, including in convenience and mens/boys wear goods sub-categories. In particular, good quality units for higher order and mainstream retailers were found to be lacking in the centre. In addition, the study identified a weak evening economy in Gosport, linked to the relative lack of pubs, restaurants and bars.

4.6 The study found that Gosport retained only 25% of total available comparison goods expenditure within Zones 1-4 of the survey area (representing the 'best fit' with the Borough boundary). It found that the remaining 75% of trade was being directed towards other town centres within and beyond the borough and out-of-centre retail warehouse provision.

4.7 Based on a constant market share approach, the study estimated capacity for 993 sqm net of comparison floorspace by 2011, growing to 1,805 sqm net by 2016, 2,702 sqm net by 2021 and 3,737 sqm net by 2026. The study forecast that if no investment were to take place in the plan period, Gosport's market share would erode as competing shopping schemes came forward elsewhere in the region. It confirmed that additional floorspace could be supported if it was of sufficient quality to claw back trade from competing shopping destinations.

4.8 The study found that there was no residual capacity to support additional convenience floorspace in the Borough between 2006 and 2021.

2011 Partial Update

4.9 In 2011, GVA was instructed by the Council to revisit the 2007 Retail Study and update the baseline convenience goods capacity projections. The purpose of this Partial Update was to take into account significant changes since the original study was completed, including the effects of the recession and new developments in the retail pipeline.

4.10 The study included a partial health check update to Gosport, focusing mainly on convenience provision. It concluded that Gosport was still a healthy town centre and continued to offer a good range of convenience and comparison shops and services. Convenience provision was in line with the national average, as were the number of vacancies. However, the study recognised that there was still room to improve the offer in Gosport and secure investment to help it maintain its role and function moving forward.

4.11 Due to the lack of any significant changes in convenience goods provision in the Borough since 2007, the Partial Update was informed by the original 2007 household survey results which were considered to remain relevant. The updated review of convenience goods shopping in the Borough reinforced the findings of the 2007 study, and confirmed that there was no need for the Council to plan for any additional large scale convenience goods provision in the Borough over the plan period. The study concluded that additional large-scale foodstore development in the Borough, over and above existing commitments, would be likely to lead to significant trade diversion from existing stores, both within Gosport and beyond the Borough boundary (e.g. Fareham). It concluded that the detrimental effects of such diversion on vitality and viability would vary depending on the nature and location of new foodstore development.

Location and Urban Form

4.12 Gosport Town Centre is the principal shopping area within the Borough, and is situated on the southern tip of the peninsula, opposite Portsmouth Harbour. The centre consists of a traditional linear High Street on an east-west axis with a mix of historic, purpose-built and converted retail properties with convenience, comparison and service operators. The centre plays an important role as the economic, social and civic focus of the Borough with the Council offices, local history centre and Discovery Centre library. Retail expenditure in the town is enhanced by tourists and visitors which are drawn to the centre due to its ties with maritime heritage.

4.13 Gosport's retail offer is almost exclusively confined to the pedestrianised, linear High Street, which extends from the ferry terminal at the harbour to the Gosport Retail Park and Morrisons store along Walpole Road. There are also a few shops on both North Cross Street and Bemister's Lane and a precinct of shops called the Gosport Shopping Precinct on South Cross Street.

Diversity of Uses

4.14 Based on the latest Experian Goad Summary Report (November 2012), the town centre comprises 28,642 sqm gross retail and service floorspace across 149 units. Table 4.1 below sets out the diversity of retail and service units in Gosport town centre compared to the national average as recorded by the latest Experian Goad survey.

4.15 The Council's most recent audit of the centre was undertaken in February 2014 and identifies 37,513 sqm (gross) floorspace across the centre across 182 units. This is higher than the latest counts identified by the Experian. Upon close examination, the difference appears to be due to the greater number of miscellaneous units included within the Council's surveys (such as offices, health and community facilities). Excluding these uses, the centre has a total 29,005 sqm (gross) across 161 units, which is closely aligned to Experian counts.

4.16 Table 4.1 below compares the latest figures in town centre uses as recorded by the Council's audit counts in 2007, 2011 and 2014. To allow us to compare the most recent figures to the national average, we have removed 'miscellaneous uses' from both the Council's and Experian's counts and reweighted the UK average accordingly.

Table 4.1: Gosport Composition of Uses (Units), 2007 - 2014

	2007		2011		2014			
	Units	%	Units	%	Units	%	UK Average* %	Variance
Convenience	14	9.0	12	7.6	13	8.1	8.9	-0.8
Comparison	68	43.9	68	43.3	67	41.6	41.4	0.2
Service	64	41.3	59	32.4	67	41.6	36.9	4.7
Vacant	9	5.8	18	11.5	14	8.7	12.8	-4.1
Total	155	100	157	100	161	100	100	-

Source: Gosport Borough Council Town Centre Audits. Figures may not sum due to rounding. *Average from Experian Goad Summary Report, reweighted discounting miscellaneous uses.

Convenience

4.17 Table 4.1 shows that the number of convenience units in the town centre has remained relatively stable across the assessment period. Convenience provision in the centre accounts for 8.1% of total units in the centre, which is only slightly below the re-weighted national average of 8.9%.

4.18 Convenience goods provision in Gosport Town Centre is anchored by a 2,229 sqm net Morrisons foodstore, which is located at the western end of the High Street. The in-store offer includes a delicatessen, café, hot food counter, pharmacy, fishmonger and butcher. The store is a key attractor to the town centre and accounts for around 9.7% of total convenience expenditure across the survey area. This is lower than the 14.2% market share the store achieved in these zones in 2007. The most recent household survey evidence indicates that store is currently underperforming (-39%) compared to the expected company turnover. Notwithstanding this, at the time of our visit (mid-morning on a weekday in January) the store was very busy. It is clear that the store continues to serves an important main food and top up shopping role.

4.19 The store also offers free car parking which provides customers the opportunity to undertake linked trips between the store and the town centre. The household survey indicates that the store plays an important role in creating linked trips to other shops and services in the centre. Around 30% of respondents who use the store for their main food shop normally link this trip with other shops and services, such as financial services (11%) and other non-food shops (6%).

4.20 Other convenience operators in the centre include a 445 sqm net Iceland foodstore, several bakeries and an off-license. There are no butchers, greengrocers, fishmongers, or convenience stores in the centre. There is a twice weekly market which operates on Tuesdays and Saturdays, which includes stalls/vans selling fresh fruit and vegetables, meat and fish.

Comparison

4.21 As shown in Table 4.1 above, there are 67 comparison goods units in Gosport Town Centre. Comparison units represent 41.6% of total units in the centre, which is around the re-weighted national average. Looking at specific sub-categories of retail provision, the centre appears to be well-represented in charity shops. The centre has below average representation of DIY and furniture shops, albeit this is not unusual given the town centre location.

4.22 The results of the Council's town centre audit demonstrate that the number of comparison units in the centre has remained stable between 2007 and 2014, despite this period coinciding with the economic crisis.

4.23 The comparison retail offer in Gosport is predominately tailored towards the lower-end/mass market, with notable comparison retailers including New Look, 99P Stores, Halfords, Pound Stretcher, Peacocks, Dorothy Perkins/Evans, M&Co, Burton, Argos, The Card Factory, Bon Marche, Store 21, Boots and Superdrug. Gosport's retail offer is complemented by a market held every Tuesday and Saturday on the High Street which is one of the largest twice-weekly markets operating along the south coast.

4.24 The household survey results indicate that Gosport town centre retains 34.8% of combined (bulky and non-bulky) comparison goods expenditure from within the survey area. This is a significant increase from the 25.0% market share recorded from these zones at the time of the 2007 study.

Service

4.25 Service units within Gosport account for 41.6% of total units, which is above the reweighted national average of 36.9%. Following a decrease in provision between 2007 and 2011, the number of service uses in the centre has grown and now accounts for 67 units.

4.26 Service units are sub-divided into three categories by Experian Goad:

- **Retail services** are Class A1 uses including hairdressers, beauty salons, travel agents, launderettes, opticians, etc. Retail service units account for 22 units in Gosport, representing 13.7% of total units. This is slightly above the re-weighted national average of 11.6%.
- **Leisure services** comprise restaurants, cafes, drinking establishments and hot food takeaways (Class A3-A5) and account for 24 units in the centre. These present 14.9% of total floorspace, which is below the re-weighted national average of 16.6%.
- **Financial and professional services** include Class A2 uses such as banks and estate agents and account or 21 units. These uses represent 13.0% of the centre, which is above the re-weighted national average of 8.7%.

Vacancies

4.27 The proportion of vacant (street level) property is an important indicator of the relative vitality and viability of a town centre. However it should be used with caution, as vacancies can arise even in the strongest town centres, particularly where properties are under alteration. Conversely, the absence of any vacancies can be a symptom of under provision of space, often restricting new and existing retailers in the centre from securing new or enhanced representation.

4.28 Following growth in vacancies between 2007 and 2011, the number of vacant units has fallen and now account for 14 vacant units. At present vacancies account for around 8.7% of total units in the centre, which is well below the national average of 12.8%.

4.29 Figure 4.1 below shows the location of vacant units at the time of the latest Experian Goad survey. As shown, there do not appear to be any particular clusters of vacancies within the town centre.

Figure 4.1: Location of Vacant Units in Gosport Town Centre (November 2012).

Source: Experian Goad. Crown Copyright 2007, License number PU100017316.

4.30 The Council's most recent audit of the town centre (undertaken in 2014) confirms that the number of vacancies has decreased. Notwithstanding this, there appears to have been a specific increase in vacancies in The Precinct on South Street, with six of the 12 units here now vacant.

4.31 Overall vacant units across the centre are relatively small, ranging in size between 30 sqm and 340 sqm (gross).

Retailer Representation and Demand

4.32 According to the most recent Goad survey there are 65 multiple retailers in the centre. This is down from the 76 multiples identified in 2007. Multiples include New Look, 99P Stores, Pound Stretcher, Peacocks, Dorothy Perkins/Evans, M&Co, Burton, Argos, Bon Marche, Store Twenty One, Boots, Halfords, Morrisons and Iceland.

4.33 According to Co-Star Focus, there are two retailer requirements within Gosport town centre (April 2014). This is significantly less than the 22 requirements recorded in the 2007 Retail Study, and coincides with a time when many retailers have put their expansions plans on hold. Although this trend is not specific to Gosport, it does indicate that the centre may have difficulties in attracting new retailers to the local market, particularly as operators may be deciding between several potential competing locations.

4.34 Of the two outstanding requirements, one is from Aldi, who we understand have submitted an application for a foodstore on part of the Gosport Waterfront. The other requirement is from Hatton Goldsmiths, who require a unit of between 10 and 50 sqm in a "prime high street location". Although there are a number vacant units which could physically accommodate this outstanding requirement, existing units may not meet specific requirements with regard to location or format. There are no published retailer requirements for leisure, professional or retail service operators in Gosport town centre.

Out of Centre Retailing

4.35 There is only one out of centre comparison goods retail store in Gosport: The Range at Brockhurst Industrial Estate. This store which sells a range of home, leisure and garden supplies and accounts for a minimal amount of comparison goods expenditure within the study area.

4.36 The only out-of-centre foodstore within the Borough is the Asda store located on Dock Road on the Cranbourne Industrial Estate, accessed from South Street. It is located around 450m south of Stoke Road District Centre and less than 600m southwest of Gosport Town Centre. The store opened in 1977 and has a net floorspace of 2,915 sqm. It is open seven days a week from 7am until 11pm (10pm on Saturday) and 10am until 4pm on Sundays. The store has a large surface car park with two hours free parking and there is a bus stop within the car park with bus services linking the store with the town centre and surrounding residential areas. The store sells a range of non-food goods including George Clothes and jewellery. It is a popular and busy store for both food and non-food goods.

4.37 The results of the household survey indicate that the store accounts for 35% of convenience goods expenditure from within the survey zones, which is higher than the 29.5% market share recorded during the 2007 study. The store trades well above the expected company benchmark (81%). Although it benefits from an extant permission for an extension of 877 sqm additional floorspace, this has not yet been implemented.

4.38 Of those that normally visit Asda for the main food shop, 25% of respondents indicated that they normally combined this other shops and services in the area, with the most frequent responses other food shopping (9%) and visiting restaurants/cafés (7%). The store therefore contributes to an element of linked trips with other shops and services in the area, albeit it is not possible to distinguish the method of travel (car or by foot) or whether the destination is Gosport Town Centre, Stoke Road, or elsewhere.

Accessibility and Pedestrian Flows

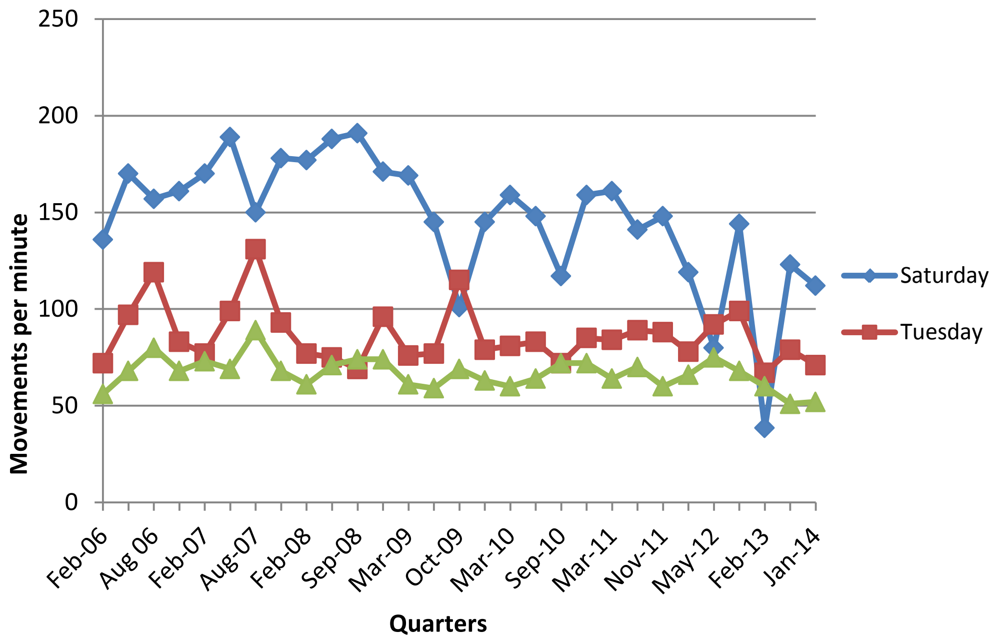
4.39 Gosport is situated on a peninsula and has a relatively isolated location in relation to the national and regional road network. Consequently, the A32, the main thoroughfare into Gosport from the M27 has a tendency to become congested at peak times. Gosport does not have a train station, and the closest link on the rail network is via Portsmouth Harbour train station, which provides direct access to the Portsmouth/Gosport ferry crossing. The town also benefits from the South East Hampshire Bus Rapid Transport which opened in April 2012 and uses the route of the former Gosport Fareham railway line to provide improved access to Fareham Town Centre and Fareham Railway Station.

4.40 One of the most important points of entry is via the passenger ferry that links Gosport and Portsmouth. The ferry terminal is located at the eastern end of the High Street adjacent to Gosport bus station and services run 363 days per year from 5am until midnight. There is also a taxi rank by the ferry terminal. There are regular bus services from the centre, which provide access throughout the Borough and to Fareham and Southampton beyond.

4.41 Gosport has a variety of short and long stay surface car parks, the majority of which are operated by the Council. This is supplemented by dedicated car parks at Morrison’s, Iceland and Halfords. Some of the short-stay car parks located close to the town centre provide free parking for up to two hours. Many of the car parks are located on the edge of the town centre and are linked to the pedestrianised High Street by narrow alleyways. There is a good provision for cyclists within the town centre with a large area of cycle parking by the ferry terminal as well as racks throughout the town centre.

4.42 Gosport High Street is pedestrianised from the ferry terminal at the harbour to the retail park and Morrison’s foodstore on Walpole Road. Since 2004 the Council have undertaken pedestrian surveys of footfall on the High Street and the results are shown in Figure 4.2 below.

Figure 4.2 : Movements per minute along Gosport High Street, 2006 - 2014



Source: Gosport Borough Council

4.43 As shown above, apart from occasional spikes in activity, weekday pedestrian movements appear to be relatively consistent over the assessment period. Flows are higher on market days (Tuesdays and Saturdays), highlighting the important role this attraction plays in generating footfall and activity in the centre.

4.44 There has been a relatively large variation in Saturday counts over the course of the footfall assessment period, with the lowest footfall recorded at 38.5 movements per minute in February 2013 and the highest 191 movements minute in September 2008. Between February 2006 and January 2014, Saturday footfall levels were on average around 152 movements per minute, however this appears to be driven mostly by the earlier half of the assessment period. The average Saturday count between March 2011 and January 2014 is around 119 movements per minute (a reduction of around 22% from the average counts between 2006 to 2011).

Environmental Quality

4.45 Gosport Town Centre is located directly adjacent to the waterfront, and the harbour provides an attractive backdrop to the town centre. The Millennium Promenade is a 3km waterfront trail which runs along from the Royal Navy Submarine Museum to the Explosion Museum and has attractive paving, street lighting, seating and art work. Along the waterfront visitors can enjoy good views across the harbour towards Portsmouth, the Isle of Wight and the Solent.

4.46 The town centre is relatively compact and the comprehensive pedestrianisation of the wide High Street provides a safe and pleasant town centre environment. There is a variety of building styles ranging from the Gosport Retail Park and Morrisons built in the early 1990s, to older Georgian, Victorian and Edwardian buildings, the 1960s Council Offices and the modern Discovery Centre. Many of the buildings are Grade II Listed. Buildings are typically two to three storeys high with offices, storage and some residential uses on the upper floors. Some of the buildings on the entry to the town from the ferry terminal would benefit from redevelopment to enhance the gateway into the town centre, particularly the bus station which occupies a prime location directly off the waterfront.

4.47 The Council has recently secured funding to improve the signage and street furniture along the High Street, which will assist in wayfinding and enhance the appearance of the area. There is an area of modern blocked paving by Morrisons and the Gosport Retail Park and Lawrence Square is an area of open space adjacent to the Council Offices and the Discovery Centre. There are landscaped gardens by the ferry terminal and there is a park on the edge of the centre separating the town centre from Stoke Road District Centre. Paving is good throughout the town centre and lighting and CCTV is present throughout the shopping area. There are several flowerbeds, street-box planters and semi-mature trees. Litter and graffiti do not appear to be a cause for concern. Many of the shop fascias now appear to be relatively tired and their attractiveness could be improved.

4.48 In June 2013, the Council was successful in securing funds from the Partnership for Urban South Hampshire (PUSH) to contribute to streetscape and environmental improvements in Gosport Town Centre. This funding will be used to help roll out Hampshire County Council's wayfinding and signage scheme in the town centre and also fund a variety of wider public realm improvements that have been developed with Portsmouth's School of

Architecture. The Wayfinding signage scheme will see the introduction of new totem maps and fingerposts at arrival points in the centre which will show destinations, estimated walk times and accessible routes. Works started earlier this year and are due to be completed in June 2014.

4.49 The Council recently consulted on plans for additional works on the High Street. These include:

- The removal of out-of-date and unnecessary street cluster;
- The introduction of a zoning strategy to provide clear pedestrian and vehicle access routes throughout the length of the High Street and facilitate the more ordered arrangement of market stalls, street furniture, landscaping and tables and chairs; and
- Replacement street furniture and painting of ironwork to complement the wayfinding scheme.

4.50 Proposals for the use of public art to enhance the town centre environment are also being sought, with an early initiative to raise the profile of the Gosport Gallery due to commence in May 2014.

4.51 Further phases of works, including the introduction of soft landscaping, are envisaged subject to additional funds being secured.

Crime and Safety

4.52 The town centre as a whole offers a fairly safe and secure daytime environment. CCTV is installed in several locations and there is plenty of natural surveillance from passers-by at most times of the day. Flats above shops also provide an opportunity for extra natural surveillance.

4.53 The telephone survey results highlight that the fear of crime continues to be one of the key reasons why people do not visit Gosport town centre in the evenings, mentioned by 13% of respondents to the household survey. Although this is lower than the 19% of respondents who identified it as an issue during the 2007 household survey, there is clearly more work to do improve activity and perceptions of safety during the evening and night-time.

Leisure Facilities and Attractions

4.54 Gosport benefits from a wide range of leisure facilities and attractions which are located across the Borough. Although they are mainly located in 'out of centre' locations, they have good linkages to the town centre and nearby residential areas. Since 2007, the aging Holbrook Leisure Centre has been redeveloped to provide a modern, up-to-date leisure centre complex now known as Gosport Leisure Park. The Park includes a swimming pool, learner pool, sports hall, health & fitness studio, dance studio and crèche/soft play area); synthetic turf complex with several 5- and 7-a-side football pitches; a Premier Inn and new Marstons pub/restaurant. Nearby is 'Planet Ice', one of the only ice rinks in the region (the next nearest being in Basingstoke).

4.55 There are also a wide variety of private and public leisure facilities in the borough, including:

- Bodyvisions Gym (private)
- Don Styler Physical Training Centre
- Lee-on-the-Solent Tennis and Squash Club
- Lloyd Vine Leisure
- Miracles gym (private)
- St Vincent Sixth Form College Leisure Centre

4.56 There are no cinemas in the Borough. Of the 66% respondents who do visit the cinema 38% tend to visit the Reel Cinema in Fareham, 36% visit the Vue at Gunwharf Quays and 22% visit the Odeon in Port Solent. There are also no ten-pin bowling facilities in the Borough. Of the 45% of respondents who undertake this activity, 85% normally visit Go Bowling in Fareham and 15% go to the Bowlplex at Gunwharf Quays.

4.57 Gosport also benefits from a large number and wide range of leisure attractions which help contribute to the vitality of the area. The household survey commissioned as part of this study asked respondents about their potential use of a variety of attractions in Gosport. The results are summarised in Table 4.2 below.

Table 4.2: Leisure Attractions across Study Area

Attractions	Visited	Heard of but not Visited	Never Heard of
Explosion Museum	59%	37%	3%
Royal Navy Submarine Museum	60%	37%	3%
Discovery Centre Library	70%	25%	5%
Marinas	45%	42%	13%
Gosport Market	87%	10%	3%
Gosport Leisure Centre	62%	35%	4%
Planet Ice	42%	37%	20%
Alver Valley Country Park	47%	40%	13%
17th Century Village	50%	44%	6%
Diving Museum	23%	61%	16%
Hovercraft Museum	29%	58%	13%
Fort Brockhurst	69%	27%	4%
Gosport Gallery	42%	38%	20%

Source: Household Telephone Survey. Figures may not sum due to rounding.

4.58 As demonstrated above, Gosport has a good range of attractions and the majority of attractions in the Borough are generally well known by respondents. The most visited attractions were the Gosport Market and Discovery Centre library and Fort Brockhurst.

Customer Views and Behaviour

4.59 We have drawn from the results of a household survey to get an indication of customer views on and behaviour in Gosport Town Centre. According to the household survey, when asked what respondents liked most about Gosport, the most frequent responses were 'nothing' (48%), 'close to home' (14%), 'easily accessible by foot/cycle' (5%) and 'good car parking' (4%). Accessibility therefore appears to be one of the primary positive characteristics of the centre. This may be a reflection of the Borough's peninsula location.

4.60 The feedback from the household survey indicates a relative dissatisfaction with current retail offer. Some of the most frequent dislikes in the centre mentioned by respondents were the 'lack of non-food shops' (41%), 'vacant shops' (16%), 'lack of foodstores' (14%), 'too many charity shops' (9%), and 'lack of choice' (7%). Although this indicates room for improvement in retail offer, 17% of respondents to the survey indicated that there was nothing that they disliked in the town centre.

4.61 When asked what would make respondents make Gosport more often, the most frequent responses were 'more non-food shops' (47%), 'nothing' (21%), 'more choice of shops' (7.5%) and 'more food shops' (7%).

4.62 In terms of its evening attractions and economy, around 57% of respondents never visit Gosport town centre in the evening. Of those that never visit Gosport in the evening the most frequently cited reasons were 'nothing to do' (38%), 'fear of crime' (13%) and 'no reason to do so' (5.5%).

4.63 Of those that do visit restaurants, most do so between once every month (15%), once every three months (7%) or less (15%). The most popular restaurant destinations were Gosport Town Centre (27%), followed by Gunwharf Quays (22.5%) and Fareham Town Centre (16%) and Lee-on-the-Solent (10%).

4.64 In addition to the household survey, Gosport Borough Council separately undertook an on-street Town Centre Survey in Gosport in October 2012 which provides an additional level of detail regarding use of the centre. The survey asked a number of questions about why, how and when respondents visited the centre and we summarise some of the main results below:

- Approximately 80% of visitors were a resident of Gosport Borough, with remaining respondents identifying themselves as either business owner/employees (10%), non-Gosport residents (9%) or market traders (1%);
- Around 85% of respondents to the survey lived in the Borough;
- The most popular form of transport to the centre was by car (44%), followed by walking (25%), bus (14%) and cycling (14%);
- Most (66%) said that they visited Gosport Town Centre at least once or twice a week;
- The majority of respondents visited the centre during the day, with only 4% stating that they visited the centre after 5pm.

- When asked why they normally come to the town centre, 41% mentioned shopping, 36% local services, and 15% mentioned work;
- The top mentioned suggested improvements to Gosport town centre were removal of empty shops/frontages (20%), a wider range of chains (18%), specialist markets (18%) and wider range of independents 13%.

Summary

- Overall, our health check indicates that Gosport continues to perform well against the national average in a number of key indicators.
- The scale of convenience, comparison goods provision in the centre is at or above the national average. Notwithstanding this, the results of the household survey indicate that there is a perceived lack of choice and range of offer for both convenience and comparison goods in the centre.
- The scale of leisure provision in the centre is below the national average. Improvements in the choice and variety of facilities could help improve this and potentially improve the level and frequency of residents who visit the town centre in the evening.
- The centre has a below average number of vacant units compared to the national average. Vacant units are small in size and scattered across the centre, albeit there appears to be a growing cluster at The Precinct on South Cross Street.
- The number of published retailer requirements in the centre has decreased significantly since the 2007 study. Since the onset of the economic recession, many retailers have significantly scaled back expansion plans and as a result more retail destinations are competing for investment. Although this is not unique to Gosport, it may create future difficulties for attracting new retailers into the local market.

5. Qualitative Assessment – District Centres

5.1 In this section, we examine the role and health of the two larger district centres in the Borough: Stoke Road and Lee-on-the-Solent. Due to the scale of these centres and the relative lack of published performance data, this section is principally informed by the latest health check audit of each centre undertaken by Gosport Borough Council and the latest available information from Experian Goad and Co-Star Focus.

5.2 Gosport also has a strong network of local centres which are generally in good health and provide important retailers and services for the everyday need of the local population. More detailed assessment of these centres is outside of the scope of this study.

Stoke Road

5.3 It is designated as a District Centre in the Local Plan Review (May 2006) and this proposed designation is carried forward in the emerging Local Plan. Stoke Road is located immediately to the west of Gosport town centre. It is a long, linear centre which extends from Walpole Park in the east to Molesworth Road to the west.

5.4 The Council's most recent audit of the centre was undertaken in February 2014 and identifies 17,213 sqm (gross) of floorspace across the centre spread over 124 units. This is higher than the 109 units identified in the 2007 Retail Study and the 104 units identified by Experian Goad in 2012. As with Gosport Town Centre, this discrepancy appears to be due primarily to the number of miscellaneous units included within the Council's audit (19 units). To allow us to compare the composition of uses in Stoke Road to the national average, we have therefore removed 'miscellaneous uses' from our assessment and reweighted the UK average accordingly.

5.5 Table 5.1 below provides a summary of the composition of uses in the centre compared to the re-weighted national average.

Table 5.1: Stoke Road Composition of Uses (Units), 2014

	No. of units	% of Total	UK Average* (%)	Variance
Convenience	4	3.8	8.9	-5.1
Comparison	32	30.5	41.4	-11.0
Service	46	43.8	36.9	6.9
Vacant	23	21.9	12.8	9.1
Total	105	100	100	-

Source: Gosport Borough Council (February 2014). UK Average from Experian Goad. *Table excludes miscellaneous due to differences in reporting.

5.6 As shown above, convenience retailing is limited to four units, which is below the national average. One of these units is a Waitrose supermarket, which anchors the centre on its western end. The store has a floorspace of c. 1,024 sqm (net) and includes a delicatessen, bakery and butcher. The survey evidence indicates that the store accounts for around 4.4% of total expenditure from within the study area, which is a decrease from the 5.5% market share achieved by the store from the same zones in 2007. Like several other main foodstore in the Borough, the store appears to be underperforming, trading about 38% below expected benchmark levels. The survey results demonstrate that the store serves an important role in creating linked goods with Stoke Road, with 20% of respondents stating that they combine their main food shop with other goods and services in the centre.

5.7 Comparison goods provision in the centre is also below average, representing approximately 30.5% of total uses. This is not unusual for a centre of this size bearing in mind its position in the retail hierarchy. Almost all of the units are operated by independents.

5.8 Service provision within Stoke Road is strong, with the proportion of service floorspace and number of units above the national average. There is a reasonable balance between retail, leisure and financial/business service units in the centre. Retail uses account for 11.4% of total units (compared to the re-weighted national average of 11.6%), leisures uses 11.47% (versus 16.6%) and professional 14.3% (versus 8.8%).

5.9 The centre suffers from a high number of vacancies, which was also identified as an issue in the 2007 Retail Study and 2011 Partial Update. The Council's survey identifies 23 vacant units which equates to an above average vacancy rate of 22%. The centre is considered vulnerable in this respect. The largest vacant units in the centre are the former Sleepland family bed centre (450 sqm gross) and the former Blockbuster video (420 sqm gross). Other vacant units range in size between 70 and 240 sqm gross and are dispersed throughout the centre, as shown below in Figure 5.1.

Table 5.1: Location of vacant units in Stoke Road District Centre (November 2012).

Source: Experian Goad. Copyright 2007, License number PU100017316.

5.10 According to the Co-Star Focus (April 2014), there are no published requirements for representation in Stoke Road.

Lee-on-the-Solent

5.11 Lee-on-the-Solent is located approximately 4.5 miles west of Gosport Town Centre, within Zone 3 of the household survey area. It is located in a relatively geographically isolated position. The centre is based around a traditional linear High Street which runs from Milvil Road in the north to just past Studland Road to the south. The cross-section of the centre along Pier Street forms part of the Conservation Area, and the area immediately to the west of the centre is a designated Marine Parade Area of Special Character.

5.12 Lee-on-the-Solent High Street is a one-way road and there is on-street car parking on one side of the road. There are also several pay-and-display surface car parks along the seafront. There is a bus stop along the High Street as well as cycle racks.

5.13 Lee-on-the-Solent has a total floorspace of 10,683 sqm over 89 outlets. Table 5.2 below provides a summary of the composition of uses in the centre compared to national average.

Table 5.2: Lee-on-the-Solent Composition of Uses (Units), 2014

	No. of units	% of Total	UK Average (%)	Variance
Convenience	9	10.1	8.8	1.3
Comparison	40	44.9	41.0	4.0
Service	35	39.3	36.5	2.8
Vacant	2	2.2	12.6	-10.4
Misc.	3	3.4	1.2	2.2
Total	89	100	100	-

Source: Gosport Borough Council (February 2014). UK Average from Experian Goad.

5.14 As shown above, the centre has a good convenience goods offer, which accounts for 10.1% of total units. This is above the national average of 8.8%. The main foodstore in the centre is a small Co-Op foodstore of around 530 sqm (net) which also accommodates a small post office. According to the survey results, this store is currently trading below expected company benchmarks (-33%). Since the 2007 Study a small Tesco Express (c, 250 sqm net) opened on Pier Street. There are also a number of independent convenience units in the centre, including a baker, two butchers, a fishmongers, a greengrocer, off-license, sweet shop and Subway sandwich shop.

5.15 The household survey results demonstrate that the Co-Op in the centre currently accounts for 1.7% of total convenience expenditure within the study area, which is slight decrease from the 2.4% market share it achieved at the time of the 2007 Retail Study. It is evident that the store predominantly serves a top-up shopping function, with most residents in Zone 3 travelling to Fareham, the Tesco at Alver Village or the out-of-centre Asda on Dock Road for their main food shopping. We note that since the 2007 a small (circa 250 sqm net) Tesco Express has opened in the centre. Although this will help supplement the existing convenience offer in the centre, it clearly serves a primarily ‘top up’ shopping role and the results of the household survey confirm that there has been little change in the market shares accounted for by town centre convenience provision within the District Centre. As such, we consider that there continues to be a qualitative argument in support of new convenience goods floorspace in the centre to prevent trade leaking to other centres and support more sustainable shopping patterns.

5.16 There are 40 comparison goods units in the centre, representing 44.9% of total floorspace which is above the national average of 41.0%. With the exception of a Boots Pharmacy and Oxfam, comparison uses in the centre are entirely operated by independent retailers. There is a good number and variety of services uses in the centre, with each of the sub-categories at or above the national average. Altogether, its composition is consistent with our expectations of a centre performing a local shopping function

5.17 As of February 2014 there were only two vacant units in the centre, which is significantly lower than the national average. The location of vacant units is shown below in Figure 5.2. Although the lack of vacancies is evidence of the continued health and vitality of the centre, such a low proportion of vacant units will mean there is limited room for retailers to expand or enhance their retail provision.

Figure 5.2: Location of vacant units in Lee-on-the-Solent District Centre (February 2013)

Source: Experian Goad. Copyright 2007, License number PU100017316.

5.18 Overall, our assessment suggests that Lee-on-the-Solent is a busy and popular centre with a range of retail and service operators meeting the day-to-day shopping requirements of local people. The centre would benefit from improved linkages between the High Street and to the seafront to encourage more visitors to use the High Street shops.

Summary

- The district centres of Stoke Road and Lee-on-the Solent provide a wide mix of services and facilities to serve their local populations. Each centre has its own distinctive character and retail offer.
- Stoke Road is considered to be more vulnerable. It has a below average convenience and comparison provision. The Waitrose store serves an important role in anchoring the centre and creates an opportunity for linked trips to other shops and services in the centre. Service provision within Stoke Road is strong, and there is a reasonable balance between retail, leisure and financial/business service units. Vacancy rates are high and this should be monitored to ensure that it does not detract from the health of the centre.
- Lee-on-the-Solent caters for an isolated catchment in the west of the Borough. The centre is healthy and has a strong convenience, comparison and service offer. There are only two vacant units, which will mean there is limited room for retailers to expand or enhance their retail provision. Convenience retailing in the centre primarily serves a top-up shopping function, with local residents travelling further afield to stores in Fareham and Gosport for their main food shopping. We consider that there is scope to enhance convenience goods provision in order to ‘claw back’ expenditure which is currently leaking from the area.
- The Borough has a strong network of local centres which are generally in good health and provide important retailers and services for the everyday need of the local population and this should be maintained.

6. Quantitative Needs Assessment

6.1 This section outlines the quantitative assessment methodology used to identify shopping patterns and quantitative retail need. Using the results of the household telephone survey (2014) we provide an analysis of shopping patterns arising in the survey area. The current performance of convenience and comparison goods floorspace across the Borough is then used as the basis for forecasting the need for additional retail floorspace up to 2029.

6.2 It is important to note that capacity forecasts become increasingly open to margins of error over time and will be influenced by potential changes in economic circumstances. Longer term projections should be treated with caution. As such it will be necessary for the Council to update these forecasts regularly over the Local Plan period.

Methodology

6.3 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns to model the existing flows of available expenditure to centres in Gosport. In accordance with the Council's brief, we have broken down our assessment of comparison goods need into "bulky" and "non-bulky" floorspace[4].

6.4 To develop the baseline position we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode and ward areas comprising the Gosport catchment area;
- Allocated the available projected expenditure to the convenience and comparison (bulky and non-bulky) goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;

[4] As defined by Experian Retail Planner Briefing Note 11 (October 2013), bulky goods are defined as DIY goods, furniture and floor coverings; major household appliances; audio-visual equipment; 10% of non-durable household goods and bicycles). Non-bulky goods are all other comparison goods (excluding 90% of non-durable household goods, which are included within the 'convenience goods' category).

- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

6.5 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough, having regard to the performance of existing floorspace.

Data Inputs

Survey Area and Household Telephone Survey

6.6 In order to identify shopping patterns across the Borough, GVA commissioned a new household telephone survey covering 400 households across four survey zones. The household telephone survey which informed the previous retail evidence base included 12 survey zones and covered an area which extended significantly beyond the Borough boundary. The results of the previous survey demonstrated that the Borough's centres and stores achieved a negligible market share from Zones 5-12 and this is highly unlikely to have changed due to the lack of any new significant comparison goods floorspace built in the Borough since 2007 and the relatively small geographic 'pulling power' of convenience floorspace. As such, we consider that Zones 1-4 of the previous survey area remain an appropriate survey area for the purposes of the present study and forms the basis of our assessment. This will also allow an opportunity to compare changes over time across these four zones.

6.7 GVA designed the survey questionnaire in consultation with the Council and NEMs market research company who undertook the interviewing and data processing in February 2014. The wording of the survey was structured to ensure that the results are representative of shopping habits across the whole of the year.

6.8 The household telephone survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.

6.9 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food) in line with industry standards. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

6.10 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with the following definitions of comparison goods expenditure by Experian Business Strategies:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances[5];
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

6.11 In order to determine the composite market share for ‘bulky’ and ‘non-bulky’ goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods types based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison bulky and non-bulky spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

[5] For the purpose of the assessment, we assumed 48.5% of “domestic appliances” were classified as ‘bulky’ in nature, in accordance with Experian expenditure sub-categories.

Estimates of Population in the Survey Area

6.12 Population estimates for each of the survey zones in 2014 is derived using the Experian E-Marketer in-house system. Population across the survey zones is increased to 2029 adopting the population growth rates used to support the Gosport Borough Local Plan.

6.13 Overall, the population of the survey area in 2014 is estimated to be 84,421. It is forecast to grow to 84,984 by 2019 and 86,200 by 2029. This represents an overall increase of around 2.1% across the assessment period.

Available Expenditure in the Survey Area

Deductions for Special Forms of Trading (SFT)

6.14 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2012 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 11 and are set out in Table 2 of Appendix 1, and Table 2 (Non-Bulky) and Table 4 (Bulky) of Appendix 2.

6.15 We have undertaken a 'sense check' to confirm that the SFT deductions applied are reasonably consistent with household survey evidence in the Borough by verifying these against the weighted, non-filtered results of the household survey. For convenience goods, the household survey indicates that approximately 4.0% of convenience expenditure across the entirety of the study area is derived from the internet (weighted 70% main food/ 30% top-up food shopping). This is higher than the 2.7% deduction for SFT recommended by Experian for 2014. However, since non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated when assessing requirements for physical floorspace. To take this into account, Experian recommend a deduction of 70%, which would bring total SFT deductions to around 1.2% according to the results of the household survey. However, the results are based on where households are most likely to do <u>most</u> of their main food and top-up shopping, and it may be that the results may understate the influence of the internet on global convenience expenditure. As such, we consider that it remains appropriate to adopt Experian SFT estimates and grow these across the assessment period as set out in Table 2 of Appendix 1.

6.16 Based on weighted (non-filtered) household survey results weighted to the various comparison goods expenditure sub-categories, the household survey results indicates that internet spending accounts for around 17.9% of non-bulky and 14.5% of bulky comparison goods expenditure across the study area. The household survey results show that internet shopping varies across various goods categories, from 11.7% (clothing goods), 14.2% (furniture goods), 2.5% (DIY), 18.9% (domestic appliances), 21.7% (audio-visual goods), 3.5% (personal and medical goods) and 37.1% (recreational and luxury goods). Although this is slightly higher than the composite Experian national estimate for comparison goods floorspace (11.6% in 2014) levels of internet spending above the national average do not justify 'protecting' this expenditure from competition from physical floorspace. We have therefore adopted Experian national SFT estimates for the purpose of this study.

Growth Rates

6.17 To estimate available expenditure in the survey area, we have applied growth rates based on the latest economic forecasts published by Experian Business Strategies (Retail Planner 11). These comprise the following:

- For convenience goods: -0.6% pa between 2012 and 2013; -0.3% pa between 2013 and 2014; 0.1% pa between 2014 and 2015; and 0.8% pa from 2016 to 2036.
- For non-bulky comparison goods: 3.1% pa between 2012 and 2013; 2.5% pa between 2013 and 2014; 2.7% pa between 2014 and 2015; 2.9% pa between 2016 and 2020; and 2.8% pa from 2021 onwards.
- For bulky comparison goods: 3.5% pa between 2012 and 2013; 1.8% pa between 2013 and 2014; 2.9% pa between 2014 and 2015; 3.1% from 2016 onwards.

6.18 These growth rates reflect that we expect spending on comparison goods to grow faster than convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the assessment period. As a result, the expenditure growth rates used in this study are less optimistic than those used in the 2007 Retail Study.

Available Expenditure

6.19 Taking these considerations into account, expenditure has been generated within each zone to highlight variations across the survey area. Using the growth rates above and applying relevant deductions for SFT, total available expenditure across each of the zones and the survey area as a whole has been grown in regular intervals up to 2029. These intervals include 5 year forecasting periods as required by the NPPF.

6.20 For convenience goods, Table 3 of Appendix 1 applies per capita expenditure within each zone to the population forecasts. This indicates that total available convenience goods expenditure within the survey area at 2014 equates to £158.4m. This is forecast to grow to £162.5m by 2019, £168.5m by 2024 and 175.8m by £2029. This equates to an overall growth of £17.4m (11% growth) between 2014 and 2029.

6.21 For non-bulky comparison goods expenditure, Table 3 of Appendix 2 indicates that expenditure from this goods sub-category equates to £164.8m in 2014. This is forecast to grow to £183.4m by 2019, £209.9m by 2024, and £242.9m by 2029. This equates to an overall growth for non-bulky comparison goods expenditure in the survey area of £78.1m between 2014 and 2029 (47.4% growth).

6.22 For bulky comparison goods, Table 5 of Appendix 2 shows that in 2014 expenditure from this goods sub-category equates to £59.7m in 2014. This is forecast to grow to £67.1m by 2019, £77.9m by 2024, to a total of £91.4m by 2029. This equates to an overall growth for comparison goods expenditure in the survey area of £31.7m between 2014 and 2029 (53.1% growth).

6.23 Again, longer term projections should be treated with caution due to the potential for changing economic circumstances and susceptibility of longer-term forecasts to margins of error.

Floorspace Data

6.24 The convenience and comparison goods floorspace data used in our modelling has been drawn from the 2007 Retail Study, 2011 Partial Update, the Institute of Grocery Distribution (IGD), health check information for Gosport and the District and Local Centres provided by Gosport Borough Council, Experian Goad and Trevor Wood Associates.

6.25 Where necessary, our floorspace assumptions for the foodstores include adjustments to identify the proportion of purely convenience goods floorspace. This accords with the expenditure data and the expenditure assumptions used.

Benchmark Sales Densities

6.26 For convenience goods, we have estimated the expected benchmark turnovers of various stores within the Borough by adopting company average sales densities from Verdict Grocery Retailers 2014. Convenience goods sales densities for the larger retailers range from £7,300 per sqm net for Iceland to £14,615 per sqm net for Asda.

6.27 For "other" stores within Gosport Town Centre and the District Centres, we have adopted average turnovers of £4,500 sqm net and £3,500 per sqm net respectively, which we consider to be reflective of the nature and extent of retailing in each centre.

6.28 No benchmarking exercise is undertaken for comparison goods, as there is more limited published floorspace and benchmark turnover data for these types of goods.

Convenience Goods Capacity Projections

6.29 Drawing on our qualitative assessment of the health and performance of existing centres and the main out-of-centre retail destinations in the Borough, this section presents our analysis of the capacity for additional convenience floorspace over the plan period to 2029. The detailed models are set out in Appendix 1.

Market Shares and Current Performance

6.30 Using the adjusted market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated market shares attributed to the main convenience destinations in the Borough. In calculating the total potential turnover of retail stores and destinations inside the Borough we have estimated the likely extent of any trade inflow, which has been derived from the results of the 2007 Retail Study and GVA assumptions.

6.31 Table 6.1 below provides a summary of existing market shares attributed to the main destinations and overall retention of convenience goods expenditure within the Borough, comparing this to the results of the 2007 Retail Study.

Table 6.1: Convenience Expenditure Market Shares between 2007 and 2014 (%)

	Gosport Study Area Zones 1-4		
	2007	2014	Change
Gosport Town Centre	16.5	11.9	-4.6
Stoke Road District Centre	5.5	4.4	-1.1
Lee-on-the-Solent District Centre	2.6	2.8	+0.2
Neighbourhood Centres	3.3	16.5	+13.2
Out-of-Centre Destinations	31.4	40.6	+9.2
Total Inside Borough (RETENTION)	59.3	76.2	+16.9
Total Outside Borough (LEAKAGE)	40.7	23.8	-16.9

Source: 2007 Retail Study and 2014 Household Survey.

6.32 As shown, the overall retention of convenience expenditure inside the Borough has increased since the previous study, growing from 59.3% in 2007 to 76.2% in 2014. Important contributing factors to this have been the opening of the Tesco in Alver Village (which has helped increase the market shares accounted for by Neighbourhood Centres from 3.3% in 2007 to around 16.5% in 2014) and out-of-centre stores such as the Asda on Dock Road.

6.33 We now consider the performance of various centres and stores in the Borough in more detail.

Gosport Town Centre

6.34 Convenience destinations in Gosport Town Centre account for 11.9% of convenience expenditure within from the study area. This is lower than the market shares attributed to town centre stores recorded in the 2007 Retail Study. On the basis of current market shares and allowing for an element of inflow (1.0%), we estimate that convenience stores in Gosport Town centre have a current turnover of £19.0m (Appendix 1, Table 5). More than half (58%) is derived from Zone 1.

6.35 The Morrisons on Walpole Road accounts for 81% of all convenience expenditure retained in the town centre. The household survey results indicate that the store has a total turnover of £15.5m, which is approximately 39% lower than expected company benchmark levels.

The results of the household survey indicate that the store draws trade from across the study area, albeit the majority comes from its own zone (Zone 1). The store accounts for 9.7% of total convenience expenditure across the study area, which is less than market share the store achieved in 2007 (14.2%).

6.36 The household survey indicates that other stores in the town centre (including the Iceland) account for 2.2% of total convenience expenditure within the survey area. This is around the same level of market share achieved by these stores in 2007 (23%). Taking into inflow, these stores have a combined turnover of £3.6m, which is lower than expected benchmark turnover of £5.9m. This is not uncommon, as surveys tend to underestimate the performance of town centre 'top up' foodstores, which instead benefit greatly from passing trade from local employees/business, tourists and shoppers.

Stoke Road District Centre

6.37 As described previously in Section 5, convenience provision in Stoke Road is relatively limited, and primarily consists of a Waitrose store. The Waitrose store accounts for 4.4% of total expenditure within the survey area, which is lower than the 5.5% market share the store achieved at the time of the 2007 household survey. Although it draws trade from across the survey area, the majority of the store's turnover (circa 84%) is drawn from Zones 1 and 2. Taking into account inflow from outside the survey area (circa 8%), the household survey shows that the convenience goods element of the store turns over £7.7m, which is approximately 38% below the expected benchmark turnover of £10.4m.

Lee-on-the-Solent District Centre

6.38 Lee-on-the-Solent District Centre consists of a Co-Op, a small Tesco Express and a number of independent convenience retailers. The results of the household survey indicate that the Co-Op accounts for a minimal amount of convenience expenditure from across the survey area (circa 1.7%) and this is drawn almost entirely from the store's primary zone (Zone 3). Based on the results of the 2007 Retail Study, we estimate that approximately 3% of the store's trade is derived from outside the study area. The results of the household survey indicate that the store has a turnover of around £2.7m and is trading around 33% below expected company benchmark.

6.39 Altogether, the household survey results indicate that all stores in Lee-on-the-Solent turnover around £4.5m including inflow, accounting for 2.8% of total convenience expenditure across the study area. This is slightly higher than the 2.6% market share attributed to these stores at the time of the 2007 household survey.

6.40 Notwithstanding this slight increase in retention, the results of the household survey show that a high proportion of residents from Zone 3 continue to travel to destinations further afield in Fareham (35.8%), out-of-centre stores in Gosport (23.6%), the Tesco at Alver Village (11.2%) and Gosport Town Centre (circa 7.6%) for main food shopping.

Neighbourhood Centres

6.41 Overall, the Borough's Neighbourhood centres account for 16.5% of total convenience expenditure within the survey area. This is significantly higher than the 3.3% market share attributed to these stores at the time of the 2007 survey and is primarily due to the opening of the Tesco in Alver Village, which is also the only significant new convenience store in the centre which has been built in the Borough since 2007.

6.42 The Tesco at Alver Village is in designated a neighbourhood centre, and replaces the old neighbourhood centre at Nimrod Drive. As this store was not trading at the time of the 2007 Retail Study there is no evidence of the proportion of the store's trade which may be attributed to inflow. Based on the location of the store and the level of inflow generated by other retail destinations in the Borough, we have assumed that the store could derive around 10% of its total trade from expenditure outside the survey area

6.43 The household survey results show that the convenience good element of the store turns over approximately £12.1m, which is a little less than half the expected company benchmark turnover of £20.9m. The store draws trade from Zones 1, 3 and 4 of the survey area, with a small proportion of trade drawn from Zone 2.

6.44 The Lidl at Forton Road is the second largest foodstore in the Borough's Neighbourhood Centres. Including inflow, we estimate that the store has a turnover of £3.1m, which is about 37% above expected company averages. Most of the store's trade is drawn from Zone 1.

6.45 The Co-Op in Palmyra Road is the third largest foodstore in the Borough's Neighbourhood Centres. Based on the household survey and including inflow, we estimate that the store has a turnover of about £3.9m, which is approximately 118% above expected company average levels. All of its trade from within the survey area is drawn from Zone 1.

6.46 The results of the Council's latest health check for the Neighbourhood Centres shows that there is a further 4,000 sqm net of convenience floorspace spread across the Borough's other centres. Around half of this is accounted for nine Co-Op stores, with the remaining half spread across a variety of independent operators. Based on the results of the household survey, we estimate these stores turnover over a total of £8.6m and account for 5.4% of convenience expenditure within the survey area. Whilst the results of the household survey indicate that these stores collectively trade below their composite expected benchmark turnover of £22.9m, household surveys tend to underestimate the performance of smaller stores of purely local significance.

Out-of-Centre Foodstores

6.47 The largest out-of-centre foodstore in the Borough is the Asda at Dock Road. Based on the household survey and taking into account an element of trade inflow (2%), we estimate that the convenience goods element of this store turns over £56.7m, or around 81% above the expected benchmark of £31.3m. Around 68% of the store's trade from within the survey area is drawn from Zone 1 and around 19% is drawn from Zone 2. The store accounts for 35% of all convenience expenditure form within the study area, the largest goods market share of any one store and more than the turnover of all of the convenience stores in Gosport Town Centre combined. The store's market share has grown since the 2007 household survey, when it accounted for 29.5% of convenience expenditure from the study area.

6.48 Additional smaller scale out-of-centre foodstores in the area include a Tesco Express on Carless Close, a Tesco Express on Forton Road and a Co-Op on Wych Lane. Together these stores turnover around £9.4m and account for 5.5% of expenditure from within the study area. The Tesco Express on Carless Close appears to be trading more than double expected company benchmark turnover (225%). Other stores appear to be trading around benchmark levels.

Commitments and Pipeline Developments

6.49 In order to ensure our capacity forecasts are as up to date and robust as possible, we need take account of new convenience goods developments already coming forward as a result of existing planning permissions. We are aware of two outstanding commitments for convenience floorspace in the Borough:

- A 1,550 sqm net Aldi foodstore which was part of a hybrid application for redevelopment of the Gosport Waterfront (reference: 14/00076/FUL) that was approved subject to signing the S106. The application site forms part of the Coldharbour mixed use allocation in the Local Plan (Saved Policy R/DP4). We have assumed 90% of the store will be used for the sale of convenience goods.
- An extant permission for a 788 sqm (GIA) extension to the Asda at Dock Road, of which c. 470 sqm (60%) will be used for the sale of convenience goods. (reference: 12/00105/FUL).

Baseline Convenience Capacity

6.50 In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will change over time. We have adopted the latest advice published by Experian (Retail Planner Briefing Note 11), which estimates per annum sales density changes of -0.7% in 2015, no growth between 2016 and 2020, and 0.1% pa growth from 2021 onwards.

6.51 Based on the combined turnover and current market share of the main convenience destinations in Gosport, the model shows that there is no surplus capacity to support new convenience floorspace in the Borough across the plan period. This is due to the 'undertrading' of existing floorspace of the Borough and the theoretical capacity that existing stores have to fulfil any increased need arising from population and expenditure growth, assuming a constant market share approach.

6.52 Notwithstanding the lack of any theoretical global capacity, we consider that there may be qualitative reasons to support a new convenience retailer in Lee-on-the-Solent District Centre in order to increase the retention of convenience expenditure within Zones 3 and 4.

6.53 Elsewhere in the Borough, there may be a qualitative case to support improvements to local town centre provision to increase choice and competition, provided that proposals are in preferable town centre locations which will contribute to linked trips to other trade and services and claw back trade from out-of-centre locations.

6.54 Previous work undertaken for the Council by GVA in 2011 provided guidance on the potential scale of new convenicne facilities to support developments at Haslar and Daedalus sites (Gosport Retail Study Partial Update). For the Haslar Peninsula, the Partial

Update concluded that need arising for new facilities to meet the local needs of new residents should be localised in nature serving the immediate residential/employment catchment for everyday and small-scale shopping requirements. On the Daedalus site, the Partial Update advised that a small convenience store of c.200 sqm net is likely to be acceptable in this location to serve the needs of new residential and employment communities, without significantly adversely affecting the vitality and viability of Lee-on-the-Solent District Centre.

6.55 All applications for retail floorspace must be tested on a case by case basis taking into account all valid material considerations, including the relevant retail tests set out in the NPPF.

Comparison Goods Capacity Projections

Market Shares

6.56 Using the adjusted market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated market shares attributed to the main comparison destinations in the Borough.

6.57 Table 6.2 below provides a summary of existing market shares attributed to the main destinations and overall retention of comparison goods expenditure within the Borough, compared to the 2007 Retail Study.

Table 6.2: Comparison Expenditure Market Shares in Zones 1-4, 2007 and 2014 (%)

	Comparison (Bulky and Non-bulky)		
	2007	2014	Change
Gosport Town Centre	25.0	37.1	+12.1
District and Neighbourhood Centres	-	0.6	+0.6
Out-of-Centre	-	1.7	+1.7
Total Inside Borough (RETENTION)	25.0	39.4	+14.4
Total Outside Borough (LEAKAGE)	75.0	60.6	-14.4

Source: 2007 Retail Study and 2014 Household Survey. Numbers may not sum due to rounding.

6.58 As shown, comparison expenditure retention inside the Borough has increased by around 50% since 2007. This is primarily driven by the increased market share achieved by Gosport Town Centre. The household survey evidence indicates that District and Local Centres play a relatively limited role in comparison goods provision, which is to be expected given their size and role in the retail hierarchy.

6.59 Overall, based on the results of the household survey and our estimates of trade inflow, we estimate that centres and stores in the Borough turnover a total of £85.2m. Based on the results of the household survey and the scale of existing comparison goods floorspace across the Borough (as recorded by the Council's latest town centre audits), the average potential turnover of all comparison goods floorspace in the Borough is around £3,895 per sqm. Although this appears to be relatively low, it incorporates comparison goods floorspace in smaller District, Neighbourhood and Local Centres which will naturally serve a more localised comparison goods role and therefore not necessarily be accurately reflected in the survey results. This will therefore artificially reduce the overall turnover of all floorspace across the District.

6.60 We have estimated the likely levels of trade inflow from outside of the study area when calculating the total potential turnover of retail destinations inside the Borough. In the absence of any information on tourist expenditure, these have been derived from the results of the 2007 Retail Study.

6.61 We consider the performance of Gosport Town Centre in more detail below.

Gosport Town Centre

6.62 The results of the household survey show that Gosport Town centre retains approximately 37.1% of available comparison goods spend in the survey area. This is an increase from the 25.0% achieved at the time of the 2007 survey. There has not been any significant increase in comparison goods floorspace in the Borough since 2007 so the reason for this increase is not clear. However, it has coincided with the economic recession so may relate to changes in price-based shopping habits.

6.63 Overall, Gosport Town Centre achieves a market share of 40.9% of non-bulky comparison goods expenditure from across the survey area, with higher retention in Zones 1 and 2.

Gosport Town Centre has the highest retention level of any one destination in Zones 1 and 2 of the study area for non-bulky comparison goods. It also achieves around 25% market share from Zones 3 and 4.

6.64 Gosport Town Centre's achieves a market share of around 17.9% across the survey area for bulky goods expenditure. This is a lower overall retention rate than for non-bulky goods, which is not unexpected given the 'bulky' nature of the products sold and their comparative tendency to be located in out-of-centre retail locations.

6.65 The results of the household survey show that comparison goods floorspace in Gosport Town Centre turns over around £79.3m. Most of this (£68.5m) is derived from non-bulky comparison goods. Based on the results of the household survey and the scale of existing comparison goods floorspace in the centre (as recorded by the Council's latest town centre audit), comparison goods floorspace in Gosport Town Centre achieves an average potential turnover of around £8,428 per sqm. This is considered to be strong, and is an improvement on the £5,710 per sqm turnover recorded at the time of the 2007 survey. Although this may indicate (unfulfilled) latent demand for retail floorspace in the town centre, we did not identify any of the symptoms of overtrading on our visits to the centre. Therefore, for the purposes of this capacity assessment we have assumed that existing floorspace is trading at equilibrium levels.

Commitments and Pipeline Developments

6.66 We are not aware of any commitments for comparison goods floorspace in the Borough.

Baseline Comparison Capacity

6.67 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time. Drawing on the latest advice published by Experian (Retail Planner Briefing Note 11), we have adopted the following annual sales density growth rates for both bulky and non-bulky goods: 2.2% in 2015, 2.1% pa between 2016 and 2020, and 2.0% pa from 2021 onwards.

6.68 Based on the combined turnover and current market share of existing comparison goods destinations in the Borough, our assessment concludes that there will be £0.3m of surplus capacity to support new comparison goods floorspace in the Borough by 2016. This is expected to grow to around £4.5m by 2022, reaching £13.3m by 2029.

6.69 To estimate total capacity for new comparison goods floorspace in the centre, we have adopted an average turnover for new floorspace of £5,500 per sqm and grown this in line with sales density assumptions discussed above. We have adopted this figure as it reflects the average turnover we would normally expect floorspace in a town centre of this size and location to achieve. Adopting these assumptions, the model shows that there is baseline capacity for 56 sqm of comparison goods floorspace by 2016 growing to 1,817 sqm by 2029. As stated above, longer term forecasts should be treated with extreme caution.

6.70 We do not consider there is any benefit in differentiating between non-bulky and bulky floorspace requirements in the Borough for the purposes of this assessment.

6.71 New floorspace should be directed to Gosport Town Centre as a priority, however this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres. However, in practice we consider that opportunities and demand in these centres will be limited.

Increased (Aspirational) Comparison Capacity

6.72 The baseline capacity assessment assumes that the Borough's centres and stores will maintain their current comparison goods market share within the study area. The present retail offer of the centre is unlikely therefore to improve at present without significant investment. We therefore consider that there may be a case for additional comparison goods floorspace provision above baseline capacity figures where it can be demonstrated that it will increase the retention of comparison goods expenditure. This may be particularly the case for bulky goods, where retention rates are currently low.

6.73 Whilst Gosport will always lose trade to competing, higher order centres, we consider that it would be reasonable to aspire to achieving an increase in the Borough-wide retention. Although the scale of uplift achievable will be inherently dependent upon the nature of any development proposals we consider that it could be feasible to increase the retention rate from 37% to 45%. We have undertaken a sensitivity exercise to provide the Council with an indication of the likely level of comparison goods floorspace which could potentially be supported based on this increase.

6.74 The results of the sensitivity exercise are set out in Appendix 2, Table 24. All other things remaining equal, in this scenario the Borough could support around 3,174 sqm (net) of comparison goods by 2016, growing to 5,365 sqm (net) by 2029.

6.75 Again, the scale of uplift achievable will depend on the scale, form and market positioning of any new development which comes forward. Clearly a very large, high quality scheme attracting anchor stores and retailers not currently represented in Gosport would have the potential to 'claw back' much more trade than a scheme which largely replicates the current offer. Additional new floorspace over and above these aspirational figures and/or support development within a shorter timescale, provided new development is of sufficient scale/quality and is effectively integrated, and subject to consideration of the potential impact on other parts of the centre. Again, longer term estimates should be treated with caution.

Summary

Convenience Capacity

- Although the market share attributed to convenience destinations in Gosport Town Centre has increased since the 2007 Retail Study, our analysis shows that convenience floorspace in the town centre trades below expected levels. Although household surveys tend to underestimate the performance of town centre stores, this may indicate a qualitative case to support new provision in the town centre to claw back expenditure from out-of-centre locations.
- Convenience provision in Stoke Road and Lee-on-the-Solent District Centres is relatively limited and this is reflected in the results of the household survey. Convenience floorspace in both these centres trade below expected company benchmark levels. For Lee-on-the-Solent in particular, the household survey results highlight that a high proportion of residents choose to do their convenience shopping in Fareham, and other less sustainable destinations elsewhere in the Borough.
- Convenience provision in the Neighbourhood Centres also play an important role in convenience shopping patterns. The Tesco at Alver Village is the largest store in a designated Neighbourhood Centre and draws trade from across the survey

zones, however appears to be trading at around only half of expected company benchmark levels.

- Out-of-centre foodstores are trading well, above expected benchmark levels and together account for around 40% of total convenience expenditure within the survey area.
- On the basis of current market shares and forecast growth in population and expenditure, we have not identified any global capacity to support additional convenience goods floorspace in the Borough over the plan period. This is primarily because many stores in the Borough are trading below expected company benchmark turnovers and are therefore able to 'absorb' any increased need from local residents over the plan period.
- There may be qualitative reasons to support a new convenience retailer in Lee-on-the-Solent District Centre to increase the retention of convenience expenditure from the northern parts of the survey area. Elsewhere in the Borough, there may be a qualitative case to support improvements to local town centre provision to increase choice and competition, provided that proposals are in preferable town centre locations which will contribute to linked trips to other trade and services and claw back trade from out-of-centre locations.
- Applications for additional floorspace must be tested on a case by case basis taking into account all valid material considerations, including the relevant retail tests set out in the NPPF.

Comparison Capacity

- For comparison goods, our analysis shows that Gosport Town Centre performs well and the market share attributed to it for comparison goods expenditure has increased by around 50% since 2007. Overall, the Borough's retention rate for comparison goods is around 39.4%. This is considered reasonably high bearing in mind the proximity of competing, higher order centres.
- Based on the results of the household survey and the scale of existing comparison goods floorspace in Gosport Town Centre we estimate that floorspace achieves an average potential turnover of around £8,428 per sqm. This is an improvement on the £5,710 per sqm turnover recorded at the time of the 2007 survey.

- Based on current market shares and forecast growth in population and expenditure, we have identified theoretical capacity to support 56 sqm of comparison goods by 2016, growing to 1,817 sqm by 2029.
- There may be a case for additional comparison goods floorspace provision above baseline capacity forecasts where it can be demonstrated that it will increase the retention of comparison goods expenditure in the Borough. This may be particularly the case for bulky goods.
- We have undertaken a sensitivity exercise to provide an indication of the likely level of additional comparison floorspace which could be supported in Borough based on an aspiration to increase the Borough-wide retention rate for comparison goods expenditure from 37% to 45%. All other things remaining equal, our sensitivity exercise demonstrates that in this scenario the Borough could support around 3,174 sqm (net) of comparison goods by 2016, growing to 5,365 sqm (net) by 2029. The scale of uplift achievable and the scope for attracting trade from beyond the survey area will depend on the scale, form and market positioning of any new development which comes forward and should be subject to consideration of impact.
- New floorspace should be directed to Gosport Town Centre as a priority, however this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres. In practice we consider that opportunities and demand in these centres will be limited.

7. Conclusions

7.1 This section summarises our headline conclusions on the qualitative and quantitative capacity for growth and change in retail provision across the Borough.

Convenience Floorspace Requirements

7.2 Taking into account all planning commitments and adopting a constant market share approach, we have not identified any additional capacity to support new convenience goods floorspace in the Borough across the plan period. This is primarily due to a number of stores in the Borough trading below expected company benchmark levels. As a result, we consider that there is a sufficient level of floorspace in the Borough to fulfil any increases in local demand arising from population and expenditure growth.

7.3 Notwithstanding this, we consider that there may be qualitative reasons to support a new convenience retailer in Lee-on-the-Solent District Centre to increase the retention of convenience expenditure from the northern parts of the survey area. There may also be a qualitative case to support improvements to local provision to increase choice and competition, provided that these are in preferable town centre locations which will contribute to linked trips to other trade and services.

7.4 Applications for additional floorspace must be tested on a case by case basis taking into account all valid material considerations, including the relevant retail tests set out in the NPPF.

Comparison Floorspace Requirements

7.5 Based on current market shares and forecast growth in population and expenditure, we have identified baseline capacity to support 56 sqm of comparison goods floorspace by 2016, growing to 1,817 sqm by 2029.

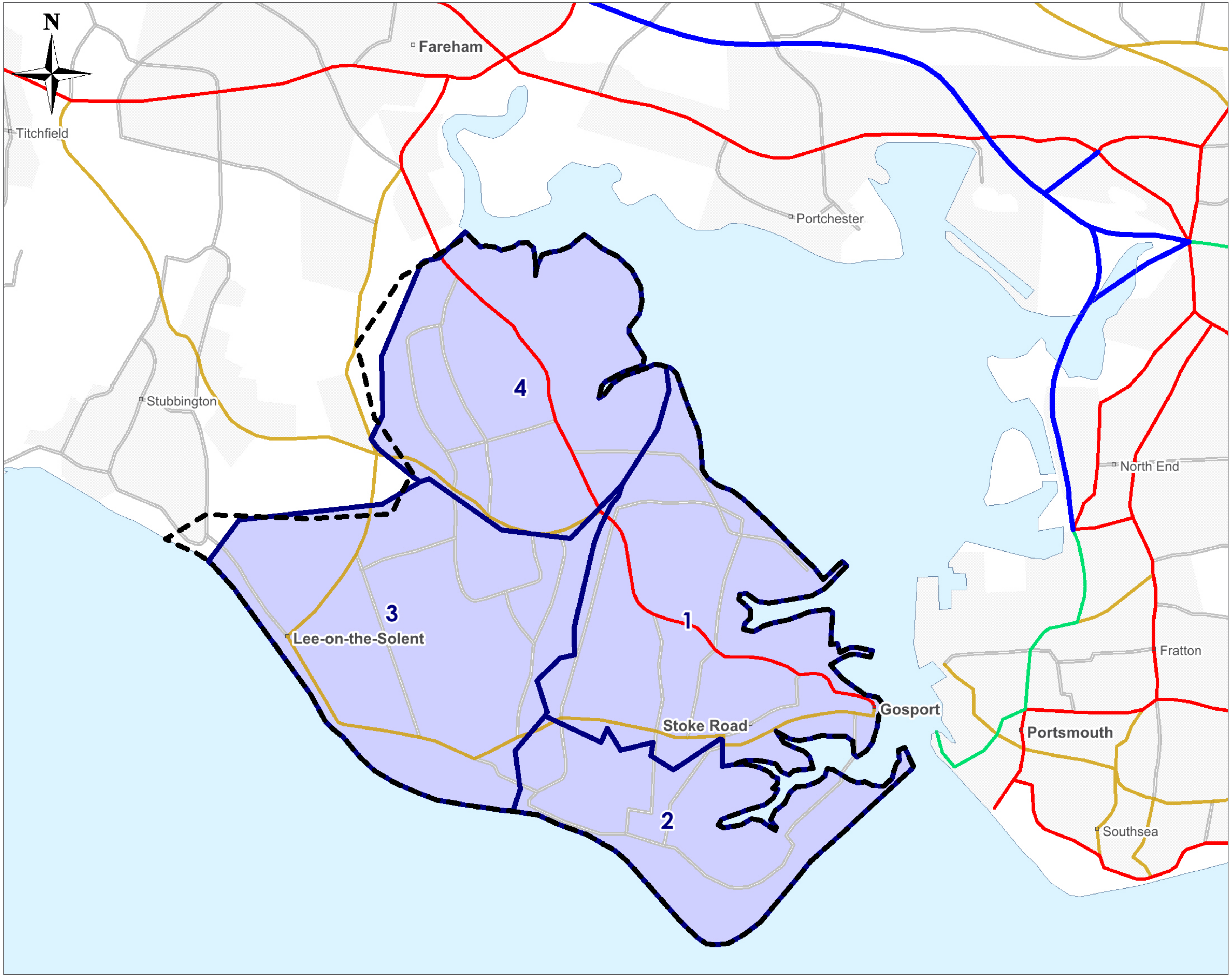
7.6 There may be a case for additional comparison goods floorspace provision above these figures where it can be demonstrated that it will increase the retention of comparison goods expenditure. This may be particularly the case for bulky goods, where there is a higher proportion of leakage.

7.7 We have undertaken a sensitivity exercise to provide an indication of the likely level of additional comparison floorspace which could be supported in Borough based on an aspiration to increase the Borough-wide retention rate for comparison goods expenditure from 37% to 45%. All other things remaining equal, our sensitivity exercise demonstrates that in this scenario the Borough could support around 3,174 sqm (net) of comparison goods by 2016, growing to 5,365 sqm (net) by 2029. The scale of uplift achievable and the scope for attracting trade from beyond the survey area will depend on the scale, form and market positioning of any new development which comes forward and should be subject to consideration of impact.

7.8 We consider that new floorspace should be directed to Gosport Town Centre as a priority, however this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres.

Plan 1

Household Survey Area



GVA

Study area and household telephone survey zones

Key

Study Area

Survey Zone

Zone	Postal Sectors
1	PO12 1/3/4
2	PO12 2
3	PO13 8/9
4	PO13 0

Gosport Retail Study 2014

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Appendix I

Convenience Capacity Forecasts

Gosport Borough Council
Retail Capacity Study 2014

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Total
2014	38,469	10,296	19,173	16,483	**84,421**
2016	38,711	10,361	19,293	16,587	**84,951**
2019	38,725	10,365	19,301	16,593	**84,984**
2022	38,917	10,416	19,396	16,675	**85,405**
2024	38,932	10,420	19,404	16,681	**85,436**
2029	39,280	10,513	19,577	16,830	**86,200**

Source: Baseline population from Experian Micromarketer, March 2014. Population grown to 2029 in line with Gosport Pre-Submission Local Plan population projections (Scenario 3).

Postal Sectors	
Zone 1	PO12 1/3/4
Zone 2	PO12 2
Zone 3	PO13 8/9
Zone 4	PO13 0

Gosport Borough Council
Retail Capacity Study 2014

CONVENIENCE GOODS

Table 2
Per Capita Convenience Goods Expenditure (2012 Prices)

Growth in convenience goods spending per capita:

2012-2013	-0.6% pa
2013-2014	-0.3% pa
2014-2015	0.1% pa
2016-2029	0.8% pa

	Zone 1	Zone 2	Zone 3	Zone 4
2012	£1,879	£2,218	£1,882	£2,003
2014	£1,862	£2,198	£1,865	£1,985
2014 Minus SFT at 2.7%	**£1,812**	**£2,139**	**£1,814**	**£1,932**
2016	£1,879	£2,218	£1,882	£2,003
2016 Minus SFT at 3.2%	**£1,819**	**£2,147**	**£1,821**	**£1,939**
2019	£1,924	£2,272	£1,927	£2,052
2019 Minus SFT at 4.0%	**£1,848**	**£2,181**	**£1,850**	**£1,970**
2022	£1,971	£2,327	£1,974	£2,101
2022 Minus SFT at 4.7%	**£1,878**	**£2,218**	**£1,881**	**£2,003**
2024	£2,003	£2,364	£2,005	£2,135
2024 Minus SFT at 4.9%	**£1,905**	**£2,248**	**£1,907**	**£2,030**
2029	£2,084	£2,460	£2,087	£2,222
2029 Minus SFT at 5.5%	**£1,969**	**£2,325**	**£1,972**	**£2,100**

Source: Experian Micromarketer, March 2014. Growth rates taken from Experian Retail Planner Briefing Note 11.

Table 3
Total Survey Area Convenience Goods Expenditure (£m) 2012 Prices

	Zone 1	Zone 2	Zone 3	Zone 4	Total
2014	£69.7	£22.0	£34.8	£31.8	**£158.4**
2016	£70.4	£22.2	£35.1	£32.2	**£160.0**
2019	£71.5	£22.6	£35.7	£32.7	**£162.5**
2022	£73.1	£23.1	£36.5	£33.4	**£166.1**
2024	£74.1	£23.4	£37.0	£33.9	**£168.5**
2029	£77.4	£24.4	£38.6	£35.3	**£175.8**

Source: Tables 1 and 2

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 4

Convenience Goods Allocation - % Market Share

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4
GOSPORT TOWN CENTRE				
Morrisons	13.8%	6.9%	5.9%	6.6%
Iceland	0.3%	0.0%	1.3%	0.0%
Other	1.6%	3.9%	0.3%	2.3%
Sub-total	**15.8%**	**10.8%**	**7.6%**	**8.8%**
DISTRICT CENTRES				
Co-Op, High Street, Lee-on-the-Solent	0.0%	0.0%	7.4%	0.3%
Other, Lee-on-the-Solent	0.0%	0.0%	4.8%	0.3%
Waitrose, Stoke Road	3.9%	14.4%	2.8%	0.5%
Sub-total	**3.9%**	**14.4%**	**15.0%**	**1.1%**
NEIGHBOURHOOD CENTRES				
Tesco, Alver Village	6.2%	2.9%	11.2%	6.6%
Lidl, Forton Road	3.3%	2.2%	0.0%	0.5%
Co-Op, Palmyra Road	5.4%	0.0%	0.0%	0.0%
Other	2.8%	7.4%	5.1%	10.1%
Sub-total	**17.6%**	**12.5%**	**16.3%**	**17.1%**
OUT-OF-CENTRE				
Asda, Dock Road	54.0%	49.0%	14.2%	6.7%
Tesco Express, Carless Close	1.3%	2.9%	8.9%	0.0%
Other	2.0%	4.3%	0.5%	5.1%
Sub-total	**57.3%**	**56.1%**	**23.6%**	**11.9%**
OUTSIDE BOROUGH BOUNDARY				
Fareham	5.2%	5.7%	35.8%	59.3%
Portsmouth	0.0%	0.0%	0.6%	1.7%
Other	0.2%	0.5%	1.1%	0.0%
	5.4%	**6.1%**	**37.6%**	**61.0%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Gosport Household Telephone Survey, February 2014

Gosport Borough Council
Retail Capacity Study 2014

CONVENIENCE GOODS

Table 5
Convenience Goods 2014 Baseline - Spend (£m) 2012, Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT TOWN CENTRE						
Morrisons	£9.6	£1.5	£2.1	£2.1	£0.2	**£15.5**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.7**
Other	£1.1	£0.9	£0.1	£0.7	£0.03	**£2.9**
Sub-total	**£11.0**	**£2.4**	**£2.6**	**£2.8**	**£0.2**	**£19.0**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.6	£0.1	£0.1	**£2.7**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.7	£0.1	£0.05	**£1.8**
Waitrose, Stoke Road	£2.7	£3.2	£1.0	£0.2	£0.64	**£7.7**
Sub-total	**£2.7**	**£3.2**	**£5.2**	**£0.4**	**£0.8**	**£12.2**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.3	£0.6	£3.9	£2.1	£1.2	**£12.1**
Lidl, Forton Road	£2.3	£0.5	£0.0	£0.2	£0.2	**£3.1**
Co-Op, Palmyra Road	£3.7	£0.0	£0.0	£0.0	£0.2	**£3.9**
Other	£1.9	£1.6	£1.8	£3.2	£0.0	**£8.6**
Sub-total	**£12.3**	**£2.8**	**£5.7**	**£5.5**	**£1.6**	**£27.8**
OUT-OF-CENTRE						
Asda, Dock Road	£37.6	£10.8	£4.9	£2.1	£1.2	**£56.7**
Tesco Express, Carless Close	£0.9	£0.6	£3.1	£0.0	£0.5	**£5.1**
Other	£1.4	£0.9	£0.2	£1.6	£0.1	**£4.2**
Sub-total	**£39.9**	**£12.4**	**£8.2**	**£3.8**	**£1.8**	**£66.1**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£3.6	£1.2	£12.5	£18.9	-	**£36.2**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£3.8**	**£1.4**	**£13.1**	**£19.4**	**-**	**£37.6**
TOTAL	**£69.7**	**£22.0**	**£34.8**	**£31.8**	**£4.4**	**£162.7**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

CONVENIENCE GOODS

Table 6
Convenience Goods 2016 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT TOWN CENTRE						
Morrisons	£9.7	£1.5	£2.1	£2.1	£0.2	**£15.6**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.7**
Other	£1.2	£0.9	£0.1	£0.7	£0.03	**£2.9**
Sub-total	**£11.1**	**£2.4**	**£2.7**	**£2.8**	**£0.2**	**£19.2**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.6	£0.1	£0.1	**£2.8**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.7	£0.1	£0.05	**£1.8**
Waitrose, Stoke Road	£2.7	£3.2	£1.0	£0.2	£0.7	**£7.8**
Sub-total	**£2.7**	**£3.2**	**£5.3**	**£0.4**	**£0.8**	**£12.3**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.4	£0.6	£3.9	£2.1	£1.2	**£12.3**
Lidl, Forton Road	£2.3	£0.5	£0.0	£0.2	£0.2	**£3.1**
Co-Op, Palmyra Road	£3.8	£0.0	£0.0	£0.0	£0.2	**£4.0**
Other	£2.0	£1.6	£1.8	£3.2	£0.00	**£8.7**
Sub-total	**£12.4**	**£2.8**	**£5.7**	**£5.5**	**£1.6**	**£28.0**
OUT-OF-CENTRE						
Asda, Dock Road	£38.0	£10.9	£5.0	£2.2	£1.3	**£57.3**
Tesco Express, Carless Close	£0.9	£0.6	£3.1	£0.0	£0.5	**£5.2**
Other	£1.4	£1.0	£0.2	£1.7	£0.1	**£4.3**
Sub-total	**£40.3**	**£12.5**	**£8.3**	**£3.8**	**£1.9**	**£66.8**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£3.6	£1.3	£12.6	£19.1	-	**£36.6**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£3.8**	**£1.4**	**£13.2**	**£19.6**	**-**	**£38.0**
TOTAL	**£70.4**	**£22.2**	**£35.1**	**£32.2**	**£4.4**	**£164.4**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 6

Convenience Goods 2019 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT TOWN CENTRE						
Morrisons	£9.9	£1.6	£2.1	£2.1	£0.2	**£15.9**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.7**
Other	£1.2	£0.9	£0.1	£0.7	£0.03	**£2.9**
Sub-total	**£11.3**	**£2.4**	**£2.7**	**£2.9**	**£0.2**	**£19.5**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.6	£0.1	£0.1	**£2.8**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.7	£0.1	£0.05	**£1.9**
Waitrose, Stoke Road	£2.8	£3.3	£1.0	£0.2	£0.7	**£7.9**
Sub-total	**£2.8**	**£3.3**	**£5.4**	**£0.4**	**£0.8**	**£12.5**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.4	£0.7	£4.0	£2.1	£1.2	**£12.5**
Lidl, Forton Road	£2.4	£0.5	£0.0	£0.2	£0.2	**£3.2**
Co-Op, Palmyra Road	£3.8	£0.0	£0.0	£0.0	£0.2	**£4.0**
Other	£2.0	£1.7	£1.8	£3.3	£0.00	**£8.8**
Sub-total	**£12.6**	**£2.8**	**£5.8**	**£5.6**	**£1.6**	**£28.5**
OUT-OF-CENTRE						
Asda, Dock Road	£38.6	£11.1	£5.1	£2.2	£1.3	**£58.2**
Tesco Express, Carless Close	£0.9	£0.6	£3.2	£0.0	£0.5	**£5.3**
Other	£1.4	£1.0	£0.2	£1.7	£0.1	**£4.3**
Sub-total	**£41.0**	**£12.7**	**£8.4**	**£3.9**	**£1.9**	**£67.9**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£3.7	£1.3	£12.8	£19.4	-	**£37.2**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£3.9**	**£1.4**	**£13.4**	**£19.9**	**-**	**£38.6**
TOTAL	**£71.5**	**£22.6**	**£35.7**	**£32.7**	**£4.5**	**£167.0**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

CONVENIENCE GOODS

Table 7
Convenience Goods 2022 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT TOWN CENTRE						
Morrisons	£10.1	£1.6	£2.2	£2.2	£0.2	**£16.2**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.7**
Other	£1.2	£0.9	£0.1	£0.8	£0.03	**£3.0**
Sub-total	**£11.5**	**£2.5**	**£2.8**	**£3.0**	**£0.2**	**£19.9**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.7	£0.1	£0.1	**£2.9**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.7	£0.1	£0.05	**£1.9**
Waitrose, Stoke Road	£2.8	£3.3	£1.0	£0.2	£0.7	**£8.0**
Sub-total	**£2.8**	**£3.3**	**£5.5**	**£0.4**	**£0.8**	**£12.8**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.5	£0.7	£4.1	£2.2	£1.3	**£12.7**
Lidl, Forton Road	£2.4	£0.5	£0.0	£0.2	£0.2	**£3.3**
Co-Op, Palmyra Road	£3.9	£0.0	£0.0	£0.0	£0.2	**£4.1**
Other	£2.0	£1.7	£1.9	£3.4	£0.00	**£9.0**
Sub-total	**£12.9**	**£2.9**	**£5.9**	**£5.7**	**£1.6**	**£29.1**
OUT-OF-CENTRE						
Asda, Dock Road	£39.4	£11.3	£5.2	£2.3	£1.3	**£59.5**
Tesco Express, Carless Close	£0.9	£0.7	£3.3	£0.0	£0.5	**£5.4**
Other	£1.5	£1.0	£0.2	£1.7	£0.1	**£4.4**
Sub-total	**£41.9**	**£13.0**	**£8.6**	**£4.0**	**£1.9**	**£69.3**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£3.8	£1.3	£13.1	£19.8	-	**£38.0**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£4.0**	**£1.4**	**£13.7**	**£20.4**	**-**	**£39.5**
TOTAL	**£73.1**	**£23.1**	**£36.5**	**£33.4**	**£4.6**	**£170.7**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

Gosport Borough Council
Retail Capacity Study 2014

CONVENIENCE GOODS

Table 7
Convenience Goods 2024 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT TOWN CENTRE						
Morrisons	£10.3	£1.6	£2.2	£2.2	£0.2	**£16.4**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.7**
Other	£1.2	£0.9	£0.1	£0.8	£0.03	**£3.1**
Sub-total	**£11.7**	**£2.5**	**£2.8**	**£3.0**	**£0.2**	**£20.2**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.7	£0.1	£0.1	**£2.9**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.8	£0.1	£0.05	**£1.9**
Waitrose, Stoke Road	£2.9	£3.4	£1.0	£0.2	£0.7	**£8.2**
Sub-total	**£2.9**	**£3.4**	**£5.5**	**£0.4**	**£0.8**	**£13.0**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.6	£0.7	£4.1	£2.2	£1.3	**£12.9**
Lidl, Forton Road	£2.4	£0.5	£0.0	£0.2	£0.2	**£3.3**
Co-Op, Palmyra Road	£4.0	£0.0	£0.0	£0.0	£0.2	**£4.2**
Other	£2.1	£1.7	£1.9	£3.4	£0.00	**£9.1**
Sub-total	**£13.1**	**£2.9**	**£6.0**	**£5.8**	**£1.7**	**£29.5**
OUT-OF-CENTRE						
Asda, Dock Road	£40.0	£11.5	£5.3	£2.3	£1.3	**£60.4**
Tesco Express, Carless Close	£1.0	£0.7	£3.3	£0.0	£0.5	**£5.5**
Other	£1.5	£1.0	£0.2	£1.7	£0.09	**£4.5**
Sub-total	**£42.5**	**£13.1**	**£8.7**	**£4.0**	**£2.0**	**£70.3**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£3.8	£1.3	£13.3	£20.1	-	**£38.5**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£4.0**	**£1.4**	**£13.9**	**£20.7**	**-**	**£40.0**
TOTAL	**£74.1**	**£23.4**	**£37.0**	**£33.9**	**£4.6**	**£173.1**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 8
Convenience Goods 2029 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT TOWN CENTRE						
Morrisons	£10.7	£1.7	£2.3	£2.3	£0.2	**£17.2**
Iceland	£0.2	£0.0	£0.5	£0.0	£0.01	**£0.8**
Other	£1.3	£1.0	£0.1	£0.8	£0.03	**£3.2**
Sub-total	**£12.2**	**£2.6**	**£2.9**	**£3.1**	**£0.2**	**£21.1**
DISTRICT CENTRES						
Co-Op, High Street, Lee-on-the-Solent	£0.0	£0.0	£2.8	£0.1	£0.1	**£3.0**
Other, Lee-on-the-Solent	£0.0	£0.0	£1.8	£0.1	£0.05	**£2.0**
Waitrose, Stoke Road	£3.0	£3.5	£1.1	£0.2	£0.7	**£8.5**
Sub-total	**£3.0**	**£3.5**	**£5.8**	**£0.4**	**£0.9**	**£13.6**
NEIGHBOURHOOD CENTRES						
Tesco, Alver Village	£4.8	£0.7	£4.3	£2.3	£1.3	**£13.5**
Lidl, Forton Road	£2.6	£0.5	£0.0	£0.2	£0.2	**£3.4**
Co-Op, Palmyra Road	£4.1	£0.0	£0.0	£0.0	£0.2	**£4.4**
Other	£2.2	£1.8	£2.0	£3.6	£0.0	**£9.5**
Sub-total	**£13.6**	**£3.1**	**£6.3**	**£6.1**	**£1.7**	**£30.8**
OUT-OF-CENTRE						
Asda, Dock Road	£41.7	£12.0	£5.5	£2.4	£1.4	**£63.0**
Tesco Express, Carless Close	£1.0	£0.7	£3.4	£0.0	£0.6	**£5.7**
Other	£1.6	£1.0	£0.2	£1.8	£0.1	**£4.7**
Sub-total	**£44.3**	**£13.7**	**£9.1**	**£4.2**	**£2.0**	**£73.4**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£4.0	£1.4	£13.8	£21.0	-	**£40.2**
Portsmouth	£0.0	£0.0	£0.2	£0.6	-	**£0.8**
Other	£0.2	£0.1	£0.4	£0.0	-	**£0.7**
Sub-total	**£4.2**	**£1.5**	**£14.5**	**£21.6**	**-**	**£41.8**
TOTAL	**£77.4**	**£24.4**	**£38.6**	**£35.3**	**£4.9**	**£180.6**

Source: Tables 3 & 4. Inflow derived from 2007 Retail Study and GVA assumptions.

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 9
Existing Floorspace

	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (£ per sqm net)	Average Turnover 2014 (£m)
GOSPORT TOWN CENTRE					
Morrisons	2,299	80%	1,839	13,823	25.4
Iceland	445	95%	423	7,304	3.1
Other	631	100%	631	4,500	2.8
Sub-total			**2,893**	**10,837**	**31.4**
DISTRICT CENTRES					
Co-Op, High Street, Lee-on-the-Solent	530	90%	477	8,602	4.1
Other, Lee-on-the-Solent	830	100%	830	3,500	2.9
Waitrose, Stoke Road	1,024	90%	922	13,469	12.4
Other, Stoke Road	143	100%	143	3,500	0.5
Sub-total			**2,229**	**8,715**	**19.4**
NEIGHBOURHOOD CENTRES					
Tesco, Alver Village	2,375	70%	1,663	12,569	20.9
Lidl, Forton Road	846	90%	761	2,987	2.3
Co-Op, Palmyra Road	233	90%	210	8,602	1.8
Other	4,238	94%	4,000	5,715	22.9
Sub-total			**6,634**	**7,211**	**47.8**
OUT-OF-CENTRE					
Asda, Dock Road	3,294	65%	2,141	14,615	31.3
Tesco Express, Carless Close	140	90%	126	12,569	1.6
Other	500	92%	459	10,936	5.0
Sub-total			**2,726**	**13,901**	**37.9**
TOTAL			**14,481**	**9,426**	**136.5**

Note A: Floorspace figures dervied from Gosport Borough Council Town Centre Audits, IGD, Experian Goad, and VOA.

Note B: Net convenience ratio derived from Verdict Grocery Retailers 2014 / GVA assumptions

Note C: Company average turnover taken from Verdict Grocery Retailers 2014

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 10
Convenience Floorspace Commitments

	Net Convenience (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2014 (£m)	Average Turnover 2016 (£m)	Average Turnover 2019 (£m)	Average Turnover 2022	Average Turnover 2024 (£m)	Average Turnover 2029 (£m)
Lidl, Gosport Waterfront (reference: 14/00076/FUL)	1,350	6,097	8.2	8.2	8.2	8.2	8.2	8.2
Asda Dock Road Extension (reference 12/00105/FUL)	470	14,615	6.9	6.8	6.8	6.8	6.8	6.9
Total			**15.1**	**15.0**	**15.0**	**15.0**	**15.1**	**15.1**

Source: Gosport Borough Council.

Table 11
Convenience Floorspace Development Pipeline

	Net Convenience (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2014 (£m)	Average Turnover 2016 (£m)	Average Turnover 2019 (£m)	Average Turnover 2022	Average Turnover 2024 (£m)	Average Turnover 2029 (£m)
N/A			0.0	0.0	0.0	0.0	0.0	0.0
Total			**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**

Source: Gosport Borough Council.

Notes: Convenience/comparison split based on GVA assumptions. Benchmark sales density derived from Mintel UK Retail Rankings 2013. Sales density grown using Experian Retail Planner Briefing Note 11 (October 2013).

Gosport Borough Council

Retail Capacity Study 2014

CONVENIENCE GOODS

Table 12
Future Shop Floorspace Capacity in Gosport (Borough-wide)

	CONVENIENCE GOODS					
	2014	2016	2019	2022	2024	2029
Market Share within Study Area (%)	79%	79%	79%	79%	79%	79%
Survey Area Residents Spending in Gosport Borough (£m)	£120.7	£121.9	£123.9	£126.6	£128.4	£134.0
Inflow (£m)	£4.4	£4.4	£4.5	£4.6	£4.6	£4.9
Total Conveninece Goods Turnover in Gosport Borough (£m)	**£125.1**	**£126.4**	**£128.4**	**£131.2**	**£133.1**	**£138.8**
Existing Shop Floorspace (sqm net)	14,481	14,481	14,481	14,481	14,481	14,481
Sales per sqm net (£)	8,638	8,578	8,578	8,587	8,595	8,638
Sales from Existing Floorspace (£m)	£125.1	£124.2	£124.2	£124.3	£124.5	£125.1
Sales from Committed/Pipeline Floorspace (£m)	£15.1	£15.0	£15.0	£15.0	£15.1	£15.1
Residual Spending to Support new shops (£m)	-	-17.3	-15.3	-12.8	-11.1	-6.2
Sales per sqm net in new shops (£) Based on large store format	12,000	11,916	11,916	11,928	11,940	12,000
Capacity for new floorspace (sqm net)	**-**	**-1,449**	**-1,284**	**-1,070**	**-930**	**-520**

Assumes growth in sales efficiency of -0.7% in 2015, 0% pa 2016-2020 and 0.1% pa post-2021 as per Experian Retail Planner 11.

Appendix II

Comparison Capacity Forecasts

Gosport Borough Council
Retail Capacity Study 2014

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Total
2014	38,469	10,296	19,173	16,483	**84,421**
2016	38,711	10,361	19,293	16,587	**84,951**
2019	38,725	10,365	19,301	16,593	**84,984**
2022	38,917	10,416	19,396	16,675	**85,405**
2024	38,932	10,420	19,404	16,681	**85,436**
2029	39,280	10,513	19,577	16,830	**86,200**

Source: Baseline population from Experian Micromarketer, March 2014. Population grown to 2029 in line with Gosport Pre-Submission Local Plan population projections (Scenario 3).

Postal Sectors	
Zone 1	PO12 1/3/4
Zone 2	PO12 2
Zone 3	PO13 8/9
Zone 4	PO13 0

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 2
Per Capita Non-Bulky Comparison Goods Expenditure (2012 Prices)

Growth in non-bulky comparison goods spending per capita:

2012-2013	3.1% pa
2013-2014	2.5% pa
2014-2015	2.7% pa
2016-2020	2.9% pa
2021-2036	2.8% pa

	Zone 1	Zone 2	Zone 3	Zone 4
2012	£1,977	£2,550	£2,114	£2,035
2014	£2,089	£2,694	£2,234	£2,151
2014 Minus SFT at 11.6%	**£1,847**	**£2,382**	**£1,975**	**£1,901**
2016	£2,208	£2,847	£2,361	£2,273
2016 Minus SFT at 13.0%	**£1,921**	**£2,477**	**£2,054**	**£1,978**
2019	£2,406	£3,102	£2,573	£2,477
2019 Minus SFT at 15.1%	**£2,042**	**£2,634**	**£2,184**	**£2,103**
2022	£2,616	£3,374	£2,798	£2,693
2022 Minus SFT at 15.9%	**£2,200**	**£2,837**	**£2,353**	**£2,265**
2024	£2,765	£3,565	£2,957	£2,846
2024 Minus SFT at 15.9%	**£2,325**	**£2,998**	**£2,486**	**£2,393**
2029	£3,174	£4,093	£3,394	£3,267
2029 Minus SFT at 16.0%	**£2,666**	**£3,438**	**£2,851**	**£2,745**

Source: Experian Micromarketer, March 2014. Growth rates taken from Experian Retail Planner Briefing Note 11.

Table 3

Total Survey Area Non-Bulky Comparison Goods Expenditure (2012 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Total
2014	£71.1	£24.5	£37.9	£31.3	**£164.8**
2016	£74.4	£25.7	£39.6	£32.8	**£172.5**
2019	£79.1	£27.3	£42.2	£34.9	**£183.4**
2022	£85.6	£29.6	£45.6	£37.8	**£198.6**
2024	£90.5	£31.2	£48.2	£39.9	**£209.9**
2029	£104.7	£36.1	£55.8	£46.2	**£242.9**

Source: Tables 1 and 2

Gosport Borough Council
Retail Capacity Study 2014

COMPARISON GOODS (BULKY)

Table 4
Per Capita Bulky Comparison Goods Expenditure (2012 Prices)

Growth in bulky comparison goods spending per capita:

2012-2013	3.5% pa
2013-2014	1.8% pa
2014-2015	2.9% pa
2016-2020	3.1% pa
2021-2036	3.1% pa

	Zone 1	Zone 2	Zone 3	Zone 4
2012	£697	£1,037	£771	£720
2014	£734	£1,093	£812	£758
2014 Minus SFT at 11.6%	**£649**	**£966**	**£718**	**£670**
2016	£779	£1,159	£862	£804
2016 Minus SFT at 15.1%	**£678**	**£1,008**	**£750**	**£700**
2019	£854	£1,270	£944	£882
2019 Minus SFT at 15.1%	**£725**	**£1,078**	**£802**	**£748**
2022	£936	£1,392	£1,035	£966
2022 Minus SFT at 15.9%	**£787.01**	**£1,171**	**£870**	**£812**
2024	£995	£1,480	£1,100	£1,027
2024 Minus SFT at 15.9%	**£837**	**£1,244**	**£925**	**£864**
2029	£1,159	£1,724	£1,281	£1,196
2029 Minus SFT at 16.0%	**£973**	**£1,448**	**£1,076**	**£1,005**

Source: Experian Micromarketer, March 2014. Growth rates taken from Experian Retail Planner Briefing Note 11.

Table 5
Total Survey Area Bulky Comparison Goods Expenditure (2012 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Total
2014	£25.0	£9.9	£13.8	£11.0	**£59.7**
2016	£26.2	£10.4	£14.5	£11.6	**£62.8**
2019	£28.1	£11.2	£15.5	£12.4	**£67.1**
2022	£30.6	£12.2	£16.9	£13.5	**£73.3**
2024	£32.6	£13.0	£18.0	£14.4	**£77.9**
2029	£38.2	£15.2	£21.1	£16.9	**£91.4**

Source: Tables 1 and 4

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 6

Non-Bulky Comparison Goods Allocation - % Market Share

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4
GOSPORT IN-CENTRE				
Gosport Town Centre	55.2%	44.6%	24.7%	25.3%
Lee-on-Solent	0.0%	0.4%	7.0%	0.0%
Other Centres	0.0%	0.0%	0.0%	0.6%
Sub-total	**55.2%**	**45.0%**	**31.7%**	**25.9%**
GOSPORT OUT-OF-CENTRE				
The Range, Gunners Way	0.5%	0.0%	0.0%	0.1%
Sub-total	**0.5%**	**0.0%**	**0.0%**	**0.1%**
OUTSIDE BOROUGH BOUNDARY				
Fareham	26.5%	28.1%	49.6%	52.9%
Portsmouth	13.1%	11.3%	5.5%	10.9%
Southampton	2.7%	10.5%	9.5%	6.6%
Other Centres/Stores	1.9%	5.1%	3.7%	3.6%
Sub-total	**44.3%**	**55.0%**	**68.3%**	**74.1%**
TOTAL	**100%**	**100%**	**100%**	**100%**

Source: Gosport Household Telephone Survey, February 2014.

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 7

Non-Bulky Comparison Goods 2014 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT IN-CENTRE						
Gosport Town Centre	£39.3	£10.9	£9.4	£7.9	£1.0	**£68.5**
Lee-on-Solent	£0.0	£0.1	£2.7	£0.0	£0.03	**£2.8**
Other Centres	£0.0	£0.0	£0.0	£0.2	£0.0	**£0.2**
Sub-total	**£39.3**	**£11.0**	**£12.0**	**£8.1**	**£1.1**	**£71.5**
GOSPORT OUT-OF-CENTRE						
The Range, Gunners Way	£0.3	£0.0	£0.0	£0.0	£0.0	**£0.3**
Sub-total	**£0.3**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.3**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£18.9	£6.9	£18.8	£16.6	-	**£61.1**
Portsmouth	£9.3	£2.8	£2.1	£3.4	-	**£17.6**
Southampton	£1.9	£2.6	£3.6	£2.1	-	**£10.2**
Other Centres/Stores	£1.4	£1.2	£1.4	£1.1	-	**£5.2**
Sub-total	**£31.5**	**£13.5**	**£25.9**	**£23.2**		**£94.0**
TOTAL	**£71.1**	**£24.5**	**£37.9**	**£31.3**	**£1.1**	**£165.8**

Source: Tables 3 & 6. Inflow derived from 2007 Retail Study and GVA assumptions.

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 8

Non-Bulky Comparison Goods 2016 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT IN-CENTRE						
Gosport Town Centre	£41.1	£11.4	£9.8	£8.3	£1.1	**£71.7**
Lee-on-Solent	£0.0	£0.1	£2.8	£0.0	£0.03	**£2.9**
Other Centres	£0.0	£0.0	£0.0	£0.2	£0.0	**£0.2**
Sub-total	**£41.1**	**£11.6**	**£12.6**	**£8.5**	**£1.1**	**£74.8**
OUT-OF-CENTRE						
The Range, Gunners Way	£0.3	£0.0	£0.0	£0.0	£0.0	**£0.4**
Sub-total	**£0.3**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.4**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£19.7	£7.2	£19.6	£17.4	-	**£64.0**
Portsmouth	£9.7	£2.9	£2.2	£3.6	-	**£18.4**
Southampton	£2.0	£2.7	£3.8	£2.2	-	**£10.7**
Other Centres/Stores	£1.4	£1.3	£1.5	£1.2	-	**£5.4**
Sub-total	**£32.9**	**£14.1**	**£27.1**	**£24.3**		**£98.4**
TOTAL	**£74.4**	**£25.7**	**£39.6**	**£32.8**	**£1.1**	**£173.6**

Source: Tables 3 & 6

COMPARISON GOODS (NON-BULKY)

Table 9
Non-Bulky Comparison Goods 2019 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT IN-CENTRE						
Gosport Town Centre	£43.7	£12.2	£10.4	£8.8	£1.1	**£76.2**
Lee-on-Solent	£0.0	£0.1	£3.0	£0.0	£0.03	**£3.1**
Other Centres	£0.0	£0.0	£0.0	£0.2	£0.0	**£0.2**
Sub-total	**£43.7**	**£12.3**	**£13.4**	**£9.0**	**£1.2**	**£79.6**
OUT-OF-CENTRE						
The Range, Gunners Way	£0.4	£0.0	£0.0	£0.0	£0.0	**£0.4**
Sub-total	**£0.4**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.4**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£21.0	£7.7	£20.9	£18.5	-	**£68.0**
Portsmouth	£10.4	£3.1	£2.3	£3.8	-	**£19.5**
Southampton	£2.2	£2.9	£4.0	£2.3	-	**£11.3**
Other Centres/Stores	£1.5	£1.4	£1.6	£1.3	-	**£5.7**
Sub-total	**£35.0**	**£15.0**	**£28.8**	**£25.8**		**£104.7**
TOTAL	**£79.1**	**£27.3**	**£42.2**	**£34.9**	**£1.2**	**£184.6**

Source: Tables 3 & 6

COMPARISON GOODS (NON-BULKY)

Table 10
Non-Bulky Comparison Goods Allocation 2022 - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT IN-CENTRE						
Gosport Town Centre	£47.3	£13.2	£11.3	£9.5	£1.2	**£82.5**
Lee-on-Solent	£0.0	£0.1	£3.2	£0.0	£0.03	**£3.4**
Other Centres	£0.0	£0.0	£0.0	£0.2	£0.0	**£0.2**
Sub-total	**£47.3**	**£13.3**	**£14.5**	**£9.8**	**£1.3**	**£86.1**
OUT-OF-CENTRE						
The Range, Gunners Way	£0.4	£0.0	£0.0	£0.0	£0.0	**£0.4**
Sub-total	**£0.4**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.4**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£22.7	£8.3	£22.6	£20.0	-	**£73.6**
Portsmouth	£11.2	£3.3	£2.5	£4.1	-	**£21.2**
Southampton	£2.3	£3.1	£4.3	£2.5	-	**£12.3**
Other Centres/Stores	£1.6	£1.5	£1.7	£1.4	-	**£6.2**
Sub-total	**£37.9**	**£16.2**	**£31.2**	**£28.0**		**£113.3**
TOTAL	**£85.6**	**£29.6**	**£45.6**	**£37.8**	**£1.3**	**£199.9**

Source: Tables 3 & 6

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 11
Non-Bulky Comparison Goods Allocation 2024 - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	**Total**
GOSPORT IN-CENTRE						
Gosport Town Centre	£50.0	£13.9	£11.9	£10.1	£1.3	**£87.2**
Lee-on-Solent	£0.0	£0.1	£3.4	£0.0	£0.04	**£3.6**
Other Centres	£0.0	£0.0	£0.0	£0.3	£0.0	**£0.3**
Sub-total	**£50.0**	**£14.1**	**£15.3**	**£10.3**	**£1.3**	**£91.1**
OUT-OF-CENTRE						
The Range, Gunners Way	£0.4	£0.0	£0.0	£0.0	£0.0	**£0.4**
Sub-total	**£0.4**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.4**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£24.0	£8.8	£23.9	£21.1	-	**£77.9**
Portsmouth	£11.9	£3.5	£2.7	£4.3	-	**£22.4**
Southampton	£2.5	£3.3	£4.6	£2.7	-	**£13.0**
Other Centres/Stores	£1.7	£1.6	£1.8	£1.4	-	**£6.6**
Sub-total	**£40.1**	**£17.2**	**£32.9**	**£29.6**		**£119.8**
TOTAL	**£90.5**	**£31.2**	**£48.2**	**£39.9**	**£1.4**	**£211.3**

Source: Tables 3 & 6

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (NON-BULKY)

Table 12
Non-Bulky Comparison Goods Allocation 2029 - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£57.9	£16.1	£13.8	£11.7	£1.5	**£100.9**
Lee-on-Solent	£0.0	£0.2	£3.9	£0.0	£0.04	**£4.1**
Other Centres	£0.0	£0.0	£0.0	£0.3	£0.0	**£0.3**
Sub-total	**£57.9**	**£16.3**	**£17.7**	**£12.0**	**£1.6**	**£105.4**
OUT-OF-CENTRE						
The Range, Gunners Way	£0.5	£0.0	£0.0	£0.0	£0.0	**£0.5**
Sub-total	**£0.5**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.5**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£27.8	£10.2	£27.7	£24.5	-	**£90.1**
Portsmouth	£13.7	£4.1	£3.1	£5.0	-	**£25.9**
Southampton	£2.9	£3.8	£5.3	£3.1	-	**£15.0**
Other Centres/Stores	£2.0	£1.8	£2.1	£1.7	-	**£7.6**
Sub-total	**£46.4**	**£19.9**	**£38.1**	**£34.2**	-	**£138.6**
TOTAL	**£104.7**	**£36.1**	**£55.8**	**£46.2**	**£1.6**	**£244.4**

Source: Tables 3 & 6

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (BULKY)

Table 13

Bulky Comparison Goods Allocation - % Market Share

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4
GOSPORT IN-CENTRE				
Gosport Town Centre	19.5%	18.1%	16.4%	15.7%
Lee-on-Solent	0.0%	0.0%	0.5%	0.0%
Other Centres	0.0%	0.0%	0.0%	0.0%
Sub-total	**19.5%**	**18.1%**	**16.9%**	**15.7%**
GOSPORT OUT-OF-CENTRE				
The Range, Gunners Way	5.3%	2.2%	0.7%	7.5%
Sub-total	**5.3%**	**2.2%**	**0.7%**	**7.5%**
OUTSIDE BOROUGH BOUNDARY				
Fareham	25.8%	30.5%	24.7%	33.0%
Portsmouth	3.2%	3.2%	2.7%	3.9%
Southampton	27.2%	27.8%	33.8%	26.4%
Other Centres/Stores	18.9%	18.2%	21.1%	13.4%
Sub-total	**75.2%**	**79.8%**	**82.3%**	**76.7%**
TOTAL	**100%**	**100%**	**100%**	**100%**

Source: Gosport Household Telephone Survey, February 2014.

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (BULKY)

Table 14
Bulky Comparison Goods 2014 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£4.9	£1.8	£2.3	£1.7	£0.2	**£10.8**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£4.9**	**£1.8**	**£2.3**	**£1.7**	**£0.2**	**£10.9**
GOSPORT OUT-OF-CENTRE						
The Range, Gunners Way	£1.3	£0.2	£0.1	£0.8	£0.0	**£2.5**
Sub-total	**£1.3**	**£0.2**	**£0.1**	**£0.8**	**£0.0**	**£2.5**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£6.5	£3.0	£3.4	£3.6	-	**£16.5**
Portsmouth	£0.8	£0.3	£0.4	£0.4	-	**£1.9**
Southampton	£6.8	£2.8	£4.7	£2.9	-	**£17.1**
Other Centres/Stores	£4.7	£1.8	£2.9	£1.5	-	**£10.9**
Sub-total	**£18.8**	**£7.9**	**£11.3**	**£8.5**	-	**£46.5**
TOTAL	**£25.0**	**£9.9**	**£13.8**	**£11.0**	**£0.2**	**£59.9**

Source: Tables 5 & 13

Gosport Borough Council
Retail Capacity Study 2014

COMPARISON GOODS (BULKY)

Table 16
Comparison Goods 2016 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£5.1	£1.9	£2.4	£1.8	£0.2	**£11.4**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£5.1**	**£1.9**	**£2.4**	**£1.8**	**£0.2**	**£11.5**
OUT-OF-CENTRE						
The Range, Gunners Way	£1.4	£0.2	£0.1	£0.9	£0.0	**£2.6**
Sub-total	**£1.4**	**£0.2**	**£0.1**	**£0.9**	**£0.0**	**£2.6**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£6.8	£3.2	£3.6	£3.8	-	**£17.4**
Portsmouth	£0.9	£0.3	£0.4	£0.4	-	**£2.0**
Southampton	£7.1	£2.9	£4.9	£3.1	-	**£18.0**
Other Centres/Stores	£4.9	£1.9	£3.0	£1.6	-	**£11.5**
Sub-total	**£19.7**	**£8.3**	**£11.9**	**£8.9**	-	**£48.9**
TOTAL	**£26.2**	**£10.4**	**£14.5**	**£11.6**	**£0.2**	**£63.0**

Source: Tables 5 & 13

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS (BULKY)

Table 17
Comparison Goods 2019 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£5.5	£2.0	£2.5	£2.0	£0.2	**£12.2**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£5.5**	**£2.0**	**£2.6**	**£2.0**	**£0.2**	**£12.3**
OUT-OF-CENTRE						
The Range, Gunners Way	£1.5	£0.2	£0.1	£0.9	£0.0	**£2.8**
Sub-total	**£1.5**	**£0.2**	**£0.1**	**£0.9**	**£0.0**	**£2.8**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£7.3	£3.4	£3.8	£4.1	-	**£18.6**
Portsmouth	£0.9	£0.4	£0.4	£0.5	-	**£2.2**
Southampton	£7.6	£3.1	£5.2	£3.3	-	**£19.3**
Other Centres/Stores	£5.3	£2.0	£3.3	£1.7	-	**£12.3**
Sub-total	**£21.1**	**£8.9**	**£12.7**	**£9.5**	-	**£52.3**
TOTAL	**£28.1**	**£11.2**	**£15.5**	**£12.4**	**£0.2**	**£67.4**

Source: Tables 5 & 13

COMPARISON GOODS (BULKY)

Table 18
Comparison Goods 2022 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£6.0	£2.2	£2.8	£2.1	£0.2	**£13.3**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£6.0**	**£2.2**	**£2.9**	**£2.1**	**£0.2**	**£13.4**
OUT-OF-CENTRE						
The Range, Gunners Way	£1.6	£0.3	£0.1	£1.0	£0.0	**£3.0**
Sub-total	**£1.6**	**£0.3**	**£0.1**	**£1.0**	**£0.0**	**£3.1**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£7.9	£3.7	£4.2	£4.5	-	**£20.3**
Portsmouth	£1.0	£0.4	£0.5	£0.5	-	**£2.4**
Southampton	£8.3	£3.4	£5.7	£3.6	-	**£21.0**
Other Centres/Stores	£5.8	£2.2	£3.6	£1.8	-	**£13.4**
Sub-total	**£23.0**	**£9.7**	**£13.9**	**£10.4**	-	**£57.0**
TOTAL	**£30.6**	**£12.2**	**£16.9**	**£13.5**	**£0.2**	**£73.5**

Source: Tables 5 & 13

COMPARISON GOODS (BULKY)

Table 19
Comparison Goods 2024 Baseline - Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£6.4	£2.3	£2.9	£2.3	£0.2	**£14.1**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£6.4**	**£2.3**	**£3.0**	**£2.3**	**£0.2**	**£14.2**
OUT-OF-CENTRE						
The Range, Gunners Way	£1.7	£0.3	£0.1	£1.1	£0.0	**£3.2**
Sub-total	**£1.7**	**£0.3**	**£0.1**	**£1.1**	**£0.0**	**£3.3**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£8.4	£4.0	£4.4	£4.8	-	**£21.6**
Portsmouth	£1.1	£0.4	£0.5	£0.6	-	**£2.5**
Southampton	£8.9	£3.6	£6.1	£3.8	-	**£22.4**
Other Centres/Stores	£6.1	£2.4	£3.8	£1.9	-	**£14.2**
Sub-total	**£24.5**	**£10.3**	**£14.8**	**£11.1**	-	**£60.7**
TOTAL	**£32.6**	**£13.0**	**£18.0**	**£14.4**	**£0.2**	**£78.1**

Source: Tables 5 & 13

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COMPARISON GOODS (BULKY)

Table 20

Comparison Goods 2029 Baseline- Spend (£m) 2012 Prices

Centre / Store	Zone 1	Zone 2	Zone 3	Zone 4	Inflow	Total
GOSPORT IN-CENTRE						
Gosport Town Centre	£7.5	£2.7	£3.5	£2.7	£0.2	**£16.6**
Lee-on-Solent	£0.0	£0.0	£0.1	£0.0	£0.0	**£0.1**
Other Centres	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Sub-total	**£7.5**	**£2.7**	**£3.6**	**£2.7**	**£0.2**	**£16.7**
OUT-OF-CENTRE						
The Range, Gunners Way	£2.0	£0.3	£0.2	£1.3	£0.0	**£3.8**
Sub-total	**£2.0**	**£0.3**	**£0.2**	**£1.3**	**£0.0**	**£3.8**
OUTSIDE BOROUGH BOUNDARY						
Fareham	£9.9	£4.6	£5.2	£5.6	-	**£25.3**
Portsmouth	£1.2	£0.5	£0.6	£0.7	-	**£3.0**
Southampton	£10.4	£4.2	£7.1	£4.5	-	**£26.2**
Other Centres/Stores	£7.2	£2.8	£4.4	£2.3	-	**£16.7**
Sub-total	**£28.7**	**£12.1**	**£17.3**	**£13.0**	-	**£71.2**
TOTAL	**£38.2**	**£15.2**	**£21.1**	**£16.9**	**£0.3**	**£91.7**

Source: Tables 5 & 13

Gosport Borough Council

Retail Capacity Study 2014

COMPARISON GOODS - ALL

Table 21
Existing Floorspace

	Net Comparison (sqm)
In-Centre	
Gosport Town Centre	9,412
Lee-on-Solent	3,020
Stoke	2,909
Neighbourhood Centres	1,448
Local Centres	1,006
Sub-total	**17,793**
Out of Centre	
The Range	4,090
Sub-total	**4,090**
TOTAL	**21,883**

Note: Floorspace figures derived from Experian Goad, 2007 Retail Study, Trevor Wood Associates and IGD. Sales densities for named retailers derived from UK Mintel Retail Rankings 2013 and Verdict 2010.

Gosport Borough Council
Retail Capacity Study 2014

Comparison Goods

Table 22
Comparison Floorspace Commitments

	Net Comparison (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2014 (£m)	Average Turnover 2016 (£m)	Average Turnover 2019 (£m)	Average Turnover 2022 (£m)	Average Turnover 2024 (£m)	Average Turnover 2029 (£m)
N/A	0		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Total	**0**		**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**

Source: Gosport Borough Council.

COMPARISON GOODS

Table 23
Future Comparison Floorspace Capacity in Gosport (Borough-wide)

	COMPARISON GOODS (ALL)					
	2014	2016	2019	2022	2024	2029
Market Share within Study Area (%)	37%	37%	37%	37%	37%	37%
Survey Area Residents Spending in Gosport Borough (£m)	£84.0	£88.0	£93.6	£101.5	£107.4	£124.5
Inflow (£m)	£1.2	£1.3	£1.4	£1.5	£1.6	£1.8
Total Comparison Goods Turnover in Gosport Borough (£m)	**£85.2**	**£89.3**	**£95.0**	**£103.0**	**£109.0**	**£126.4**
Existing Shop Floorspace (sqm net)	21,883	21,883	21,883	21,883	21,883	21,883
Sales per sqm net (£)	3,895	4,064	4,237	4,500	4,682	5,170
Sales from Existing Floorspace (£m)	85.2	88.9	92.7	98.5	102.5	113.1
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0	0.0
Residual Spending to Support new shops (£m)	0.0	0.3	2.3	4.5	6.5	13.3
Sales per sqm net in new shops (£)	5,500	5,739	5,983	6,355	6,612	7,300
Capacity for new floorspace (sqm net)	**0**	**56**	**387**	**710**	**987**	**1,817**

Assumes growth in sales efficiency of 2.2% in 2015, 2.1% pa 2016 - 2020 and 2.0% pa post-2021 as per Experian Retail Planner 11. Turnover of new floorspace taken as GVA estimate.

Gosport Borough Council
Retail Capacity Study 2014

COMPARISON GOODS

Table 24

Future Comparison Floorspace Capacity in Gosport (Borough-wide) - INCREASED MARKET SHARE

	COMPARISON GOODS (ALL)					
	2014	2016	2019	2022	2024	2029
Market Share within Study Area (%)	37%	45%	45%	45%	45%	45%
Survey Area Residents Spending in Gosport Borough (£m)	£84.0	£105.8	£112.8	£122.3	£129.5	£150.4
Inflow (£m)	£1.2	£1.3	£1.4	£1.5	£1.6	£1.8
Total Comparison Goods Turnover in Gosport Borough (£m)	**£85.2**	**£107.2**	**£114.2**	**£123.8**	**£131.1**	**£152.3**
Existing Shop Floorspace (sqm net)	21,883	21,883	21,883	21,883	21,883	21,883
Sales per sqm net (£)	3,895	4,064	4,237	4,500	4,682	5,170
Sales from Existing Floorspace (£m)	85.2	88.9	92.7	98.5	102.5	113.1
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0	0.0
Residual Spending to Support new shops (£m)	0.0	18.2	21.4	25.3	28.7	39.2
Sales per sqm net in new shops (£)	5,500	5,739	5,983	6,355	6,612	7,300
Capacity for new floorspace (sqm net)	**0**	**3,174**	**3,584**	**3,988**	**4,333**	**5,365**

Assumes growth in sales efficiency of 2.2% in 2015, 2.1% pa 2016 - 2020 and 2.0% pa post-2021 as per Experian Retail Planner 11. Turnover of new floorspace taken as GVA estimate.

Appendix III

Household Survey Results

Q01 In which shop or shopping centre do you do most of your households main food shopping ?

Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, West Street, Fareham	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Asda, Speedfields Park, Newgate Lane, Fareham	22.1%	82	2.8%	5	3.0%	2	43.3%	31	55.9%	45
Asda, Dock Road, Gosport	42.0%	157	63.1%	107	60.4%	32	16.6%	12	8.6%	7
Co-Op, High Street, Lee-on-Solent	0.5%	2	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Co-Op, Wych Lane, Bridgemary, Gosport	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Iceland, 5-7 Walpole Road, Gosport	0.3%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Iceland, West Street, Fareham	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Sainsburys, Broadcut, Wallington, Fareham	4.1%	15	3.8%	6	0.7%	0	1.6%	1	9.3%	7
Lidl, Forton Road, Gosport	1.0%	4	1.4%	2	1.8%	1	0.0%	0	0.7%	1
Lidl, Newgate Lane, Fareham	0.4%	2	0.0%	0	0.0%	0	0.7%	0	1.4%	1
Marks and Spencer, Delme Square, Fareham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Morrisons, Walpole Road, High Street, Gosport	11.5%	43	16.2%	27	7.6%	4	7.7%	5	7.7%	6
Morrisons, Commercial Centre, Anchorage Park Shopping Centre, Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco, Whiteley Way, Whiteley, Fareham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Tesco, Alver Village Square, Grange Road, Gosport	6.5%	24	6.0%	10	3.3%	2	10.9%	8	5.8%	5
Tesco, Quay Street, Fareham	1.0%	4	0.8%	1	1.0%	1	0.0%	0	2.3%	2
Tesco Express, Carless Close, Rowner, Gosport	2.7%	10	1.5%	3	3.6%	2	8.1%	6	0.0%	0
Tesco Express, Forton Road, Gosport	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Tesco Extra, North Harbour, Clement Atlee Way, Portsmouth	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Tesco Extra, Solent Retail Park, Havant	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Waitrose, Stoke Road, Gosport	4.9%	18	4.4%	7	14.7%	8	3.7%	3	0.7%	1
Fareham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Gosport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Lee-on-Solent	0.3%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Tesco, Grange Road, Gosport	0.4%	1	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Weighted base:		374		169		53		72		81
Sample:		378		94		95		93		96

Q02 When you visit (STORE/CENTRE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? [MR]
Those who do not use the internet at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes - Meeting Friends/Family	1.0%	4	0.8%	1	1.8%	1	1.1%	1	0.7%	1
Yes - Other food shops	6.6%	25	8.1%	14	4.8%	3	7.7%	6	3.5%	3
Yes - Other non-food shops	5.9%	22	4.4%	7	5.2%	3	7.3%	5	8.1%	7
Yes - window shopping / browsing	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Bars / Pubs	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Yes - Restaurants/cafes	4.9%	19	6.4%	11	3.2%	2	5.0%	4	2.7%	2
Yes - Leisure activity (cinema/bowling/bingo/theatre/library)	1.6%	6	0.8%	1	2.4%	1	3.5%	3	1.3%	1
Yes - Getting petrol	1.8%	7	0.0%	0	0.0%	0	0.8%	1	7.5%	6
Yes - Gym / Health and Fitness / Swimming	0.5%	2	0.0%	0	1.8%	1	1.1%	1	0.0%	0
Yes - Markets	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Yes - Financial Service (Banks, Building Society)	3.3%	12	2.1%	4	4.4%	2	4.8%	4	3.5%	3
Yes - Personal Service (Hairdressers, Beauty Salon)	0.8%	3	1.5%	3	0.9%	0	0.0%	0	0.0%	0
Yes - Other Service (Travel Agent, Estate Agent)	0.3%	1	0.0%	0	0.9%	0	0.0%	0	0.8%	1
Yes - Taking children to/from school	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Yes - Travelling to/from work	1.5%	6	1.5%	3	1.6%	1	2.1%	2	0.8%	1
Yes - Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No	75.1%	286	76.7%	131	74.3%	40	73.8%	55	73.2%	60
(Don't know / varies)	0.5%	2	0.9%	1	0.0%	0	0.6%	0	0.0%	0
Weighted base:		381		170		53		75		82
Sample:		385		95		97		95		98

Q03 How often does your household also visit OTHER shops, leisure or service outlets on the same shopping trip ? [PR]
Those who said Yes at Q02

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Always	27.4%	26	25.3%	10	26.4%	4	22.8%	4	35.9%	8
Normally	10.8%	10	6.2%	2	22.4%	3	21.2%	4	2.6%	1
Sometimes	34.7%	32	30.9%	12	34.4%	5	38.5%	7	38.2%	8
Rarely	16.1%	15	26.0%	10	13.5%	2	11.3%	2	4.7%	1
Hardly ever	9.2%	9	8.9%	3	3.3%	0	6.2%	1	15.9%	4
(Don't know)	1.7%	2	2.7%	1	0.0%	0	0.0%	0	2.6%	1
Weighted base:		93		38		14		19		22
Sample:		103		19		29		29		26

Q04 Apart from the (STORE/CENTRE MENTIONED AT Q01), are there any other stores / centres that you use regularly to do a main food shop? [MR]
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, West Street, Fareham	5.9%	14	12.3%	12	0.9%	0	0.0%	0	3.5%	2
Asda, Speedfields Park, Newgate Lane, Fareham	10.1%	24	6.0%	6	2.5%	1	20.6%	11	12.7%	6
Asda, Dock Road, Gosport	15.4%	36	14.9%	14	24.0%	9	13.9%	8	10.7%	5
Co-Op, The Parade, Tukes Avenue, Gosport	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Co-Op, Gregson Avenue, Bridgemary, Gosport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-Op, High Street, Lee-on-Solent	1.6%	4	0.0%	0	0.0%	0	6.2%	3	1.2%	1
Co-Op, Dartmouth Cuort, Priddy's Hard, Gosport	0.4%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, The Green, Stubbington	0.3%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Iceland, 5-7 Walpole Road, Gosport	8.0%	19	8.0%	8	1.3%	1	14.7%	8	5.8%	3
Iceland, West Street, Fareham	1.2%	3	0.0%	0	0.0%	0	1.2%	1	4.8%	2
Sainsburys, Broadcut, Wallington, Fareham	4.0%	9	2.6%	3	3.4%	1	2.0%	1	9.6%	5
Lidl, Forton Road, Gosport	14.2%	34	26.0%	25	8.3%	3	2.5%	1	8.3%	4
Lidl, Newgate Lane, Fareham	3.8%	9	2.2%	2	0.0%	0	2.0%	1	12.2%	6
Marks and Spencer, Delme Square, Fareham	0.5%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Marks and Spencer, Hedge End, Tollbar Way	0.7%	2	1.1%	1	0.0%	0	0.0%	0	1.2%	1
Marks and Spencer, Whiteley Village, Fareham	0.3%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Morrisons, Walpole Road, High Street, Gosport	26.2%	62	34.2%	33	33.3%	13	17.6%	9	13.5%	6
Tesco, Whiteley Way, Whiteley, Fareham	1.3%	3	0.0%	0	0.0%	0	4.6%	2	1.4%	1
Tesco, Alver Village Square, Grange Road, Gosport	6.5%	15	4.6%	4	5.6%	2	9.2%	5	7.9%	4
Tesco, Quay Street, Fareham	1.4%	3	0.0%	0	0.9%	0	0.0%	0	6.2%	3
Tesco Express, Carless Close, Rowner, Gosport	3.3%	8	0.0%	0	1.2%	0	12.7%	7	1.0%	0
Tesco Express, Forton Road, Gosport	3.1%	7	2.6%	3	9.9%	4	0.0%	0	2.2%	1
Tesco Extra, North Harbour, Clement Atlee Way, Portsmouth	1.0%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Solent Retail Park, Havant	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Tesco Metro, Southsea	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Waitrose, Stoke Road, Gosport	9.1%	22	10.9%	11	15.9%	6	5.7%	3	3.8%	2
Fareham	0.3%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Gosport	3.6%	8	2.7%	3	1.3%	1	3.1%	2	7.7%	4
Lee-on-Solent	0.3%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Portchester	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Local Shops, Bridgemary	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco, Grange Road, Gosport	1.0%	2	1.5%	1	2.1%	1	0.0%	0	0.0%	0
Weighted base:		237		97		39		54		47
Sample:		255		61		69		64		61

Q05 Where do you do most of your household's small scale 'top-up' food shopping ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, West Street, Fareham	1.0%	3	0.0%	0	3.2%	1	2.4%	2	0.0%	0
Asda, Speedfields Park, Newgate Lane, Fareham	3.9%	12	0.0%	0	3.2%	1	7.6%	5	8.7%	5
Asda, Dock Road, Gosport	19.6%	58	32.6%	41	22.3%	9	8.5%	6	2.5%	2
Co-Op, Rowner Road, Bridgemary, Gosport	2.0%	6	1.9%	2	0.0%	0	3.6%	2	1.8%	1
Co-Op, Bury Road, Gosport	0.6%	2	1.0%	1	1.2%	1	0.0%	0	0.0%	0
Co-Op, Forton Road, Gosport	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-Op, The Parade, Tukes Avenue, Gosport	0.6%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Co-Op, Palmyra Road, Gosport	5.7%	17	13.3%	17	0.0%	0	0.0%	0	0.0%	0
Co-Op, Gregson Avenue, Bridgemary, Gosport	1.2%	4	0.0%	0	0.0%	0	0.7%	0	5.0%	3
Co-Op, High Street, Lee-on-Solent	4.2%	12	0.0%	0	0.0%	0	18.1%	12	1.0%	1
Co-Op, Dartmouth Cuort, Priddy's Hard, Gosport	1.2%	3	2.7%	3	0.0%	0	0.0%	0	0.0%	0
Co-Op, Twyford Drive, Cherque Farm, Lee-on-the-Solent	2.3%	7	0.0%	0	0.0%	0	8.6%	6	1.7%	1
Co-Op, Privett Road, Gosport	2.7%	8	2.7%	3	8.5%	4	1.7%	1	0.0%	0
Co-Op, Carisbrooke road, Gosport	0.8%	2	0.0%	0	0.0%	0	0.9%	1	2.8%	2
Co-Op, Wych Lane, Bridgemary, Gosport	2.8%	8	0.0%	0	0.0%	0	0.0%	0	13.6%	8
Co-Op, West Street, Portchester	0.8%	2	0.0%	0	0.0%	0	3.8%	2	0.0%	0
Iceland, The Green, Stubbington	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Iceland, 5-7 Walpole Road, Gosport	0.6%	2	1.0%	1	0.0%	0	0.7%	0	0.0%	0
Iceland, West Street, Fareham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lidl, Forton Road, Gosport	3.8%	11	7.8%	10	3.1%	1	0.0%	0	0.0%	0
Lidl, Newgate Lane, Fareham	1.9%	6	0.0%	0	0.0%	0	0.7%	0	8.3%	5
Marks and Spencer, Delme Square, Fareham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Morrisons, Walpole Road, High Street, Gosport	5.6%	16	8.4%	11	5.2%	2	1.9%	1	3.8%	2
One Stop, Village Road, Alverstoke, Gosport	0.8%	2	0.0%	0	5.4%	2	0.0%	0	0.0%	0
One Stop, Beauchamp Avenue, Rowner, Gosport	2.5%	7	0.0%	0	2.1%	1	0.0%	0	10.7%	7
Tesco, Alver Village Square, Grange Road, Gosport	7.3%	21	6.6%	8	2.0%	1	11.9%	8	7.4%	4
Tesco, Quay Street, Fareham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Express, Carless Close, Rowner, Gosport	2.9%	9	0.8%	1	1.1%	0	10.8%	7	0.0%	0
Tesco Express, Forton Road, Gosport	4.1%	12	6.7%	9	8.4%	3	0.0%	0	0.0%	0
Tesco Express, Lee Solent Marine, Pier Street, Lee-on-the-Solent	1.2%	3	0.0%	0	0.0%	0	5.3%	3	0.0%	0
Tesco Extra, North Harbour, Clement Atlee Way, Portsmouth	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Waitrose, Stoke Road, Gosport	3.2%	10	2.7%	3	13.6%	6	0.7%	0	0.0%	0
Alverstoke Village	0.6%	2	0.0%	0	4.2%	2	0.0%	0	0.0%	0
Fareham	1.4%	4	0.0%	0	0.0%	0	0.0%	0	6.7%	4
Gosport	5.6%	17	5.5%	7	13.1%	5	1.0%	1	5.8%	3
Lee-on-Solent	1.7%	5	0.0%	0	0.0%	0	6.7%	4	1.1%	1
Co-Op, Arundel Drive, Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Co-Op, San Diego Road, Gosport	2.0%	6	4.6%	6	0.0%	0	0.0%	0	0.0%	0
Co-Op, Tukes Avenue,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Gosport										
Co-op, Queens Parade, Gosport	0.5%	1	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Iceland, Stubbington Green, Fareham	0.4%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Local Shops, Bridgemary	1.2%	4	0.0%	0	0.0%	0	0.0%	0	6.1%	4
Local Shops, Rowner	0.7%	2	0.0%	0	0.0%	0	1.7%	1	1.7%	1
Sainsburys, Leigh Road, Eastleigh	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Grange Road, Gosport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Weighted base:		294		127		41		65		61
Sample:		292		69		72		80		71

Q06 Where do you usually do most of your household's shopping for clothes, footwear and other fashion goods ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	35.7%	116	33.1%	48	22.7%	10	41.1%	26	44.7%	32
Gosport Town Centre	23.6%	77	27.9%	41	30.5%	14	20.5%	13	13.1%	9
GunWharf Quays, Portsmouth Harbour	10.3%	34	16.3%	24	9.8%	4	0.0%	0	7.7%	5
Havant Town Centre	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Locks Heath Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Portchester Town Centre	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Portsmouth Town Centre	11.8%	39	10.3%	15	11.3%	5	10.4%	7	16.5%	12
Southampton Town Centre	5.9%	19	3.1%	4	9.2%	4	9.4%	6	6.6%	5
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hedge End (Marks and Spencer, Homebase, etc)	2.1%	7	1.0%	1	4.0%	2	1.8%	1	3.3%	2
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	1.6%	5	0.0%	0	1.1%	1	5.6%	4	1.8%	1
Victory Retail Park, Portsmouth (Dreams)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Whiteley Shopping Centre	4.9%	16	6.2%	9	2.1%	1	7.9%	5	1.6%	1
Basildon	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bournemouth	0.5%	2	0.7%	1	1.1%	1	0.0%	0	0.0%	0
Chichester	0.9%	3	0.0%	0	3.3%	1	0.0%	0	1.8%	1
Gunwharf Quays, Portsmouth	0.3%	1	0.0%	0	1.1%	1	0.9%	1	0.0%	0
Lee-on-the-Solent	0.1%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
London	0.6%	2	0.7%	1	0.0%	0	1.3%	1	0.0%	0
Park Gate, Southampton	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
West Quay Retail Park, Southampton	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Weighted base:		326		145		45		63		71
Sample:		320		79		85		74		82

Q07 When you visit (LOCATION MENTIONED AT Q06) for your clothes and footwear shopping, do you combine your shopping with other activities, for example leisure/entertainment, restaurants, bars, foodstore, etc? [MR]
Those who do clothing and footwear shopping at Q06

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Yes - Meeting Friends	1.5%	6	2.0%	3	1.7%	1	1.0%	1	0.7%	1
Yes - Meeting Family	0.7%	3	0.6%	1	0.7%	0	0.9%	1	0.6%	0
Yes - Other non-food shops	6.7%	26	6.2%	11	3.4%	2	8.4%	7	8.0%	7
Yes - Other food shops	4.5%	18	0.8%	1	7.6%	4	4.6%	4	10.3%	9
Yes - Ferry Trip	0.2%	1	0.0%	0	0.9%	0	0.0%	0	0.6%	0
Yes - Sailing and Marine Related Activities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Bars / Pubs	1.6%	6	1.2%	2	2.4%	1	0.0%	0	3.4%	3
Yes - Restaurants	14.8%	57	16.7%	29	11.6%	6	5.0%	4	22.1%	18
Yes - Cafes	14.0%	54	15.5%	27	21.1%	11	4.8%	4	14.9%	12
Yes - Cinemas	5.5%	21	7.6%	13	5.7%	3	2.1%	2	4.0%	3
Yes - Ten Pin Bowling	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Yes - Gym / Health and Fitness	0.6%	2	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Yes - Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Swimming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Markets	0.4%	2	0.0%	0	0.9%	0	0.0%	0	1.3%	1
Yes - Theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Museums / Art Gallery	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Yes - Discovery Centre / Library	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Yes - Financial Service (Banks, Building Society)	1.4%	6	1.3%	2	3.3%	2	0.6%	0	1.3%	1
Yes - Personal Service (Hairdressers, Beauty Salon)	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - Other Service (Travel Agent, Estate Agent)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - Other	0.7%	3	0.0%	0	1.9%	1	1.4%	1	0.8%	1
No	58.4%	226	60.3%	106	51.9%	27	71.5%	55	46.0%	38
(Don't know)	2.4%	9	2.9%	5	2.7%	1	0.8%	1	2.6%	2
Weighted base:		387		175		52		77		83
Sample:		381		97		95		94		95

Q08 Where do you do most of your households shopping for furniture, floor coverings and household textiles ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	10.2%	24	13.6%	14	4.4%	1	7.0%	3	9.2%	5
Gosport Town Centre	19.0%	44	14.7%	16	31.8%	10	22.8%	9	17.3%	10
Havant Town Centre	0.5%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Portchester Town Centre	0.5%	1	0.0%	0	0.0%	0	1.2%	0	1.0%	1
Portsmouth Town Centre	1.4%	3	1.2%	1	4.3%	1	0.0%	0	1.0%	1
Southampton Town Centre	18.0%	42	14.9%	16	17.0%	5	24.4%	10	19.8%	11
Waterlooville Town Centre	0.2%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Broadcut Retail Park, Fareham (Dreams, Staples, etc)	0.2%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0
Central Retail Park, Havant (Wickes, etc)	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	2.5%	6	4.2%	4	2.6%	1	1.2%	0	0.0%	0
Hedge End (Marks and Spencer, Homebase, etc)	9.7%	23	8.4%	9	10.0%	3	19.4%	8	5.3%	3
Hedge End Retail Park (Dfs, Scs, etc)	6.1%	14	5.7%	6	4.9%	2	6.8%	3	7.2%	4
Mountbatten Retail Park, Southampton (Dreams, IKEA, Staples, etc)	2.9%	7	6.1%	6	1.1%	0	0.0%	0	0.0%	0
Port Solent (Cycle Surgery, Snow and Rock, Bookends)	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	3.0%	7	0.0%	0	0.0%	0	0.0%	0	12.3%	7
The Junction/Ocean Retail Park, Portsmouth (PC World, Toys R Us etc)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1
The Range, Gunners Way	6.3%	15	4.2%	4	2.6%	1	1.7%	1	15.5%	9
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	5.7%	13	6.8%	7	5.0%	2	7.5%	3	2.9%	2
Whiteley Shopping Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Axminster	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Chichester	0.4%	1	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Lee-on-the-Solent	0.2%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Lincoln	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Park Gate, Southampton	6.6%	15	8.1%	9	6.4%	2	4.2%	2	5.5%	3
Segensworth	3.9%	9	8.6%	9	0.0%	0	0.0%	0	0.0%	0
Southsea	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
West Quay Retail Park, Southampton	0.2%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0
Weighted base:		234		106		32		40		57
Sample:		219		56		57		49		57

Q09 Where do you do most of your households shopping for DIY and decorating goods ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	23.6%	75	23.2%	32	25.7%	12	22.1%	14	24.2%	17
Gosport Town Centre	7.5%	24	11.8%	16	5.5%	3	2.7%	2	4.9%	3
Havant Town Centre	0.8%	2	0.0%	0	0.0%	0	3.9%	2	0.0%	0
Locks Heath Town Centre	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Portsmouth Town Centre	1.6%	5	1.1%	1	0.0%	0	5.6%	4	0.0%	0
Southampton Town Centre	0.3%	1	0.0%	0	1.0%	0	0.0%	0	0.7%	0
Waterlooville Town Centre	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Central Retail Park, Havant (Wickes, etc)	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	23.0%	73	12.3%	17	40.7%	19	33.5%	21	22.4%	16
Hedge End (Marks and Spencer, Homebase, etc)	2.5%	8	1.7%	2	2.8%	1	2.0%	1	4.5%	3
Hedge End Retail Park (Dfs, Scs, etc)	1.4%	4	2.9%	4	0.0%	0	0.8%	0	0.0%	0
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	14.6%	46	11.7%	16	0.0%	0	18.6%	12	26.5%	19
The Range, Gunners Way	10.4%	33	17.0%	23	5.7%	3	0.8%	0	9.4%	7
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	7.6%	24	9.4%	13	12.8%	6	6.0%	4	2.3%	2
Whiteley Shopping Centre	0.1%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Alverstoke	0.1%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Glasgow	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Park Gate, Southampton	2.3%	7	1.5%	2	2.0%	1	0.8%	0	5.2%	4
Segensworth	3.3%	10	6.5%	9	1.1%	1	1.7%	1	0.0%	0
Weighted base:		318		136		48		63		71
Sample:		316		76		85		74		81

Q10 Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	9.5%	24	11.2%	14	2.8%	1	5.8%	3	14.0%	7
Gosport Town Centre	29.8%	76	34.8%	43	27.4%	10	18.8%	9	29.6%	14
Locks Heath Town Centre	0.8%	2	1.2%	1	0.0%	0	1.0%	0	0.0%	0
Portsmouth Town Centre	3.3%	8	5.2%	6	1.0%	0	2.3%	1	1.2%	1
Southampton Town Centre	5.5%	14	4.7%	6	6.2%	2	8.0%	4	4.9%	2
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	2.0%	5	0.0%	0	14.3%	5	0.0%	0	0.0%	0
Hedge End (Marks and Spencer, Homebase, etc)	5.8%	15	4.0%	5	12.5%	5	7.4%	3	3.7%	2
Hedge End Retail Park (Dfs, Scs, etc)	2.7%	7	1.2%	1	1.3%	0	5.1%	2	5.1%	2
Mountbatten Retail Park, Southampton (Dreams, IKEA, Staples, etc)	0.2%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Pompey Centre, Portsmouth (B&Q, etc)	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Port Solent (Cycle Surgery, Snow and Rock, Bookends)	2.1%	5	4.4%	5	0.0%	0	0.0%	0	0.0%	0
Solent Retail Park, Solent Road, Havant (Sports Direct, Peacocks etc.)	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	2.8%	7	2.5%	3	3.5%	1	2.7%	1	3.2%	2
The Range, Gunners Way	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	16.9%	43	7.6%	9	21.1%	8	31.6%	15	23.5%	11
Edinburgh	0.5%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Hedgend	0.2%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Lee-on-the-Solent	0.2%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Park Gate, Southampton	11.7%	30	13.8%	17	7.3%	3	7.9%	4	13.6%	7
Segensworth	4.4%	11	6.3%	8	1.3%	0	6.5%	3	0.0%	0
West Quay Retail Park, Southampton	0.2%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Weighted base:		255		124		36		47		48
Sample:		243		64		65		58		56

Q11 Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment ?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	14.0%	35	17.1%	20	12.8%	5	10.0%	4	11.1%	6
Gosport Town Centre	20.7%	52	25.8%	31	10.5%	4	18.6%	8	18.1%	9
Portchester Town Centre	3.6%	9	3.0%	4	8.4%	3	0.0%	0	4.5%	2
Portsmouth Town Centre	3.0%	7	0.9%	1	4.9%	2	3.7%	2	5.8%	3
Southampton Town Centre	6.0%	15	4.2%	5	11.2%	4	9.4%	4	3.2%	2
Broadcut Retail Park, Fareham (Dreams, Staples, etc)	2.4%	6	4.6%	5	0.0%	0	0.0%	0	1.1%	1
Burfields Retail Park, Portsmouth (Staples, Pets at Home, Homebase etc.)	0.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	2.4%	6	0.0%	0	12.8%	5	0.0%	0	2.4%	1
Hedge End (Marks and Spencer, Homebase, etc)	5.1%	13	2.9%	3	7.5%	3	9.7%	4	4.6%	2
Hedge End Retail Park (Dfs, Scs, etc)	2.2%	6	2.5%	3	1.0%	0	4.1%	2	1.1%	1
Pompey Centre, Portsmouth (B&Q, etc)	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Port Solent (Cycle Surgery, Snow and Rock, Bookends)	0.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Solent Retail Park, Solent Road, Havant (Sports Direct, Peacocks etc.)	0.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	1.8%	4	0.0%	0	3.4%	1	0.0%	0	6.1%	3
The Junction/Ocean Retail Park, Portsmouth (PC World, Toys R Us etc)	1.8%	4	2.9%	3	0.0%	0	0.0%	0	2.1%	1
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	17.7%	44	10.9%	13	15.3%	6	32.1%	14	23.2%	12
Whiteley Shopping Centre	1.1%	3	0.9%	1	1.3%	1	2.5%	1	0.0%	0
Brighton	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Hedgend	0.2%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Leeds	0.5%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Park Gate, Southampton	13.9%	35	16.4%	19	8.4%	3	8.7%	4	16.7%	9
Segensworth	1.5%	4	3.1%	4	0.0%	0	0.0%	0	0.0%	0
West Quay Retail Park, Southampton	0.2%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Weighted base:		250		118		38		42		51
Sample:		248		67		65		57		59

Q12 At which centre or store do you do most of your households shopping on goods for personal care, such as soaps, beauty products, medical goods?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	26.3%	96	16.4%	27	8.6%	4	34.7%	25	50.5%	40
Gosport Town Centre	58.9%	216	77.0%	128	75.3%	37	28.4%	20	37.9%	30
GunWharf Quays, Portsmouth Harbour	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Havant Town Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Portchester Town Centre	1.0%	4	0.0%	0	0.0%	0	3.5%	2	1.3%	1
Portsmouth Town Centre	1.2%	4	0.9%	1	4.8%	2	0.9%	1	0.0%	0
Southampton Town Centre	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	3.1%	12	4.0%	7	0.0%	0	0.0%	0	6.0%	5
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	4.7%	17	0.9%	1	7.9%	4	12.8%	9	3.5%	3
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Whiteley Shopping Centre	0.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Basildon	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Bridgemary	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Lee-on-the-Solent	3.2%	12	0.0%	0	0.0%	0	16.6%	12	0.0%	0
London	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Park Gate, Southampton	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Weighted base:		366		167		49		71		79
Sample:		359		91		90		89		89

Q13 At which centre or store do you do most of your households shopping on goods for recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery?
Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Cosham Town Centre	0.2%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Fareham Town Centre	32.3%	54	13.6%	9	38.6%	9	40.1%	13	54.1%	23
Gosport Town Centre	52.0%	86	78.3%	55	42.8%	10	28.3%	9	31.5%	13
Portsmouth Town Centre	3.1%	5	5.1%	4	2.0%	0	1.5%	0	1.5%	1
Southampton Town Centre	3.2%	5	0.0%	0	8.5%	2	7.5%	2	2.5%	1
Collingwood Retail Park, Newagte Lane, Fareham (Homebase, Pets at Home)	0.7%	1	0.0%	0	2.3%	1	0.0%	0	1.4%	1
Hedge End (Marks and Spencer, Homebase, etc)	0.3%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Speedfields Retail Park, Newgate Lane, Fareham (Wickes, Furniture Express)	2.1%	4	0.0%	0	0.0%	0	7.7%	2	2.5%	1
The Range, Gunners Way	0.6%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Titchfield Retail Park, Southampton Road, Titchfield (Harveys, etc)	1.3%	2	0.0%	0	0.0%	0	0.0%	0	5.0%	2
Whiteley Shopping Centre	0.9%	2	1.5%	1	0.0%	0	1.5%	0	0.0%	0
Bridgemary	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Lee-on-the-Solent	1.9%	3	0.0%	0	0.0%	0	10.1%	3	0.0%	0
London	0.3%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0
Park Gate, Southampton	0.4%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Titchfield	0.3%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Weighted base:		166		70		23		32		42
Sample:		171		41		40		41		49

Q14 What do you like about Gosport Town Centre? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Nothing / very little	47.6%	192	41.8%	75	48.1%	26	56.5%	46	50.8%	44
Close to work / en route to work	3.0%	12	4.7%	8	0.9%	1	2.6%	2	1.2%	1
Easily accessible by foot / cycle	4.9%	20	7.3%	13	3.5%	2	2.9%	2	2.7%	2
Good and / or free car parking	4.0%	16	4.9%	9	3.9%	2	3.5%	3	2.5%	2
Good bus service / accessible public transport	0.9%	4	0.7%	1	0.0%	0	0.0%	0	2.8%	2
Ferry	2.4%	10	3.0%	5	1.8%	1	1.4%	1	2.6%	2
Explosion Museum	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Submarine Museum	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to Waterfront	2.8%	11	4.9%	9	4.8%	3	0.0%	0	0.0%	0
Millennium Promenade	0.3%	1	0.0%	0	0.9%	1	0.8%	1	0.0%	0
Part of an overall day out	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Good range of chain / well known stores	2.6%	11	0.7%	1	2.3%	1	2.1%	2	7.3%	6
Good range of independent stores	2.7%	11	4.3%	8	2.3%	1	1.5%	1	0.5%	0
Good prices	0.4%	1	0.0%	0	1.5%	1	0.7%	1	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	3.5%	14	4.2%	8	1.8%	1	2.0%	2	4.7%	4
Cleanliness	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Restaurant / cafes	1.6%	6	1.9%	3	1.7%	1	1.3%	1	1.2%	1
Markets	2.2%	9	1.3%	2	3.3%	2	3.5%	3	2.2%	2
Pubs / bars	0.4%	2	0.0%	0	0.8%	0	1.3%	1	0.0%	0
Good range of services (bank, library, hairdresser etc.)	2.3%	9	2.6%	5	3.4%	2	2.6%	2	0.7%	1
Good foodstores	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good leisure facilities (Gosport Leisure Centre, cinema, health and fitness clubs, etc)	0.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Waterfront	1.4%	5	1.3%	2	0.7%	0	1.4%	1	1.9%	2
Other	7.8%	31	7.5%	14	4.6%	3	9.1%	7	9.2%	8
It is close to home	13.8%	56	19.8%	36	22.0%	12	3.8%	3	5.5%	5
It is quiet	2.0%	8	2.1%	4	2.4%	1	2.1%	2	1.2%	1
It is pedestrianised	1.7%	7	2.8%	5	0.0%	0	0.6%	0	1.3%	1
(Don't know)	8.0%	32	4.9%	9	5.6%	3	13.7%	11	10.7%	9
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q15 What do you dislike about Gosport Town Centre? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Nothing / very little	17.4%	70	19.9%	36	9.8%	5	16.6%	13	17.9%	16
Difficult to park	2.1%	9	1.9%	3	0.9%	1	4.9%	4	0.7%	1
Difficult to park near shops	0.4%	2	0.7%	1	0.0%	0	0.0%	0	0.5%	0
Too long / inconvenient journey	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Traffic congestion	0.9%	4	0.0%	0	0.0%	0	3.0%	2	1.3%	1
Poor bus services	0.2%	1	0.0%	0	0.8%	0	0.0%	0	0.5%	0
Poor accessibility by foot / cycle	0.3%	1	0.0%	0	0.8%	0	0.0%	0	0.7%	1
No Mainline Railway Station	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of foodstores	13.9%	56	12.9%	23	14.6%	8	5.8%	5	23.3%	20
Lack of non-food stores	41.5%	167	41.2%	74	54.6%	30	25.5%	21	48.9%	42
Lack of eating and drinking places	1.1%	4	0.0%	0	1.5%	1	0.0%	0	4.1%	4
Too expensive	0.9%	4	1.2%	2	0.9%	1	1.3%	1	0.0%	0
Poor security for shoppers / cars	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Poor lighting	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Poor access for disabled	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vacant shops	16.2%	65	14.3%	26	22.2%	12	14.1%	11	18.5%	16
Other	4.0%	16	5.3%	10	5.2%	3	3.3%	3	1.3%	1
Too many charity shops	9.0%	36	8.8%	16	8.1%	4	12.8%	10	6.4%	6
It is rundown	4.2%	17	3.6%	6	5.4%	3	7.2%	6	2.0%	2
There isn't much choice	7.3%	29	7.7%	14	3.4%	2	9.6%	8	6.5%	6
Expensive parking	4.4%	18	2.7%	5	5.6%	3	6.3%	5	5.3%	5
It is unclean	2.5%	10	1.5%	3	2.4%	1	4.1%	3	3.4%	3
Poor market	1.1%	4	0.0%	0	3.9%	2	1.5%	1	1.2%	1
Too many betting shops	1.2%	5	1.2%	2	2.7%	1	1.3%	1	0.0%	0
There are no large retailers	1.8%	7	3.5%	6	1.5%	1	0.0%	0	0.0%	0
There is nothing there	0.7%	3	0.7%	1	0.0%	0	0.6%	0	1.2%	1
Poor quality shops	1.2%	5	1.6%	3	1.7%	1	1.2%	1	0.0%	0
Too many coffee shops	0.8%	3	0.7%	1	0.0%	0	1.5%	1	0.5%	0
Poor environment	1.8%	7	2.1%	4	2.4%	1	2.0%	2	0.7%	1
It is too busy	0.4%	2	0.0%	0	1.7%	1	0.7%	1	0.0%	0
(Don't know)	3.6%	14	1.3%	2	0.7%	0	12.9%	10	1.4%	1
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	

Q17 Is there anything that would make you shop in or visit Gosport Town Centre more often ? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.7%	3	0.0%	0	0.8%	0	0.6%	0	2.0%	2
Cheaper parking	5.2%	21	5.0%	9	6.1%	3	5.8%	5	4.8%	4
Cheaper prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easier / more parking	1.3%	5	0.6%	1	0.7%	0	4.5%	4	0.0%	0
More food stores	7.2%	29	6.4%	11	4.3%	2	0.6%	0	17.2%	15
More leisure facilities (e.g. cinema etc.)	2.8%	11	2.6%	5	1.5%	1	3.9%	3	3.2%	3
More non-food stores	46.7%	188	51.7%	93	45.0%	25	33.7%	27	49.6%	43
A particular retailer/occupier	4.0%	16	2.6%	5	15.1%	8	1.3%	1	2.5%	2
More places to eat / drink	2.9%	12	3.8%	7	2.2%	1	0.7%	1	3.4%	3
More security / better personal safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.5%	2	0.0%	0	2.6%	1	0.0%	0	0.7%	1
Other	4.7%	19	4.9%	9	6.3%	3	7.3%	6	0.7%	1
Nothing	21.2%	86	19.4%	35	12.7%	7	30.2%	25	22.1%	19
A Marks and Spencers	5.5%	22	5.2%	9	8.6%	5	3.2%	3	6.3%	5
A John Lewis	0.6%	2	0.0%	0	3.5%	2	0.6%	0	0.0%	0
A Next	4.0%	16	5.2%	9	0.7%	0	6.3%	5	1.7%	2
A Primark	5.5%	22	4.6%	8	0.0%	0	5.7%	5	10.8%	9
A Wilkinsons	1.1%	4	1.9%	3	0.8%	0	0.7%	1	0.0%	0
A Debenhams	1.3%	5	1.6%	3	1.5%	1	0.0%	0	1.9%	2
A BHS	0.8%	3	0.8%	1	2.3%	1	0.0%	0	0.5%	0
More large chains	2.2%	9	1.9%	3	0.0%	0	0.7%	1	5.6%	5
Independent shops	1.9%	8	1.9%	3	5.1%	3	1.9%	2	0.0%	0
More choice of shops	7.5%	30	10.6%	19	2.4%	1	1.9%	2	9.7%	8
Free parking	2.6%	11	4.0%	7	0.0%	0	4.1%	3	0.0%	0
Improve the market	1.5%	6	1.7%	3	2.6%	1	0.6%	0	1.1%	1
Better quality shops	2.0%	8	3.4%	6	0.8%	0	2.0%	2	0.0%	0
Better environment	0.9%	4	0.0%	0	1.6%	1	3.4%	3	0.0%	0
Make it undercover	1.5%	6	1.5%	3	0.7%	0	0.7%	1	3.0%	3
Update it	0.9%	3	0.7%	1	0.0%	0	0.6%	0	2.0%	2
(Don't know)	2.9%	12	0.0%	0	7.3%	4	6.0%	5	3.4%	3
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q18 Have you heard or visited any of the following attractions in Gosport ? [PR]

Explosion Museum

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Heard of, but not visited	37.4%	151	30.4%	55	28.3%	16	40.0%	33	55.5%	48
Visited	59.3%	239	66.6%	120	71.7%	39	54.9%	45	40.5%	35
(Not heard of)	3.2%	13	3.0%	5	0.0%	0	5.0%	4	4.0%	3
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Royal Navy Submarine Museum

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Heard of, but not visited	37.1%	150	38.0%	69	21.6%	12	39.6%	32	42.9%	37
Visited	59.9%	241	59.0%	107	78.4%	43	55.1%	45	54.4%	47
(Not heard of)	3.0%	12	3.0%	5	0.0%	0	5.3%	4	2.7%	2
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

The Discovery Centre Library

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Heard of, but not visited	25.3%	102	21.2%	38	18.3%	10	27.5%	22	36.0%	31
Visited	70.0%	282	75.7%	137	80.2%	44	65.9%	54	55.4%	48
(Not heard of)	4.7%	19	3.0%	5	1.5%	1	6.6%	5	8.6%	7
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Marinas (e.g. Haslar, Gosport, Royal Clarence)

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Heard of, but not visited	42.1%	170	39.6%	71	50.6%	28	40.1%	33	44.0%	38
Visited	44.9%	181	49.3%	89	40.8%	22	39.4%	32	43.4%	38
(Not heard of)	13.0%	52	11.0%	20	8.6%	5	20.5%	17	12.6%	11
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Gosport Market										
Heard of, but not visited	9.9%	40	7.4%	13	9.7%	5	7.9%	6	16.9%	15
Visited	87.4%	352	92.6%	167	89.6%	49	83.3%	68	79.1%	68
(Not heard of)	2.7%	11	0.0%	0	0.7%	0	8.8%	7	3.9%	3
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Gosport Leisure Centre										
Heard of, but not visited	34.5%	139	32.7%	59	38.8%	21	35.2%	29	34.6%	30
Visited	61.7%	249	67.3%	121	60.3%	33	54.2%	44	57.9%	50
(Not heard of)	3.9%	16	0.0%	0	0.8%	0	10.6%	9	7.5%	6
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Planet Ice										
Heard of, but not visited	37.3%	150	32.0%	58	46.8%	26	37.2%	30	42.2%	36
Visited	42.5%	171	48.5%	88	35.0%	19	34.1%	28	42.4%	37
(Not heard of)	20.3%	82	19.4%	35	18.2%	10	28.7%	23	15.4%	13
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Alver Valley Country Park										
Heard of, but not visited	39.8%	161	40.0%	72	43.9%	24	26.8%	22	49.1%	42
Visited	47.2%	190	45.8%	83	47.5%	26	61.8%	50	36.5%	32
(Not heard of)	12.9%	52	14.2%	26	8.6%	5	11.4%	9	14.5%	13
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
17th Century Village										
Heard of, but not visited	44.2%	178	42.2%	76	43.0%	24	47.0%	38	46.7%	40
Visited	50.0%	201	55.0%	99	51.9%	28	41.8%	34	45.9%	40
(Not heard of)	5.8%	23	2.8%	5	5.1%	3	11.3%	9	7.4%	6
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Diving Museum										
Heard of, but not visited	60.7%	245	69.1%	125	47.6%	26	45.8%	37	65.4%	57
Visited	22.9%	92	19.0%	34	37.4%	20	28.0%	23	17.0%	15
(Not heard of)	16.5%	66	11.9%	22	15.0%	8	26.2%	21	17.6%	15
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Hovercraft Museum										
Heard of, but not visited	58.1%	234	57.8%	104	66.8%	37	48.9%	40	61.8%	53
Visited	29.0%	117	28.1%	51	21.6%	12	38.4%	31	26.5%	23
(Not heard of)	13.0%	52	14.1%	26	11.6%	6	12.7%	10	11.7%	10
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101
Fort Brockhurst										
Heard of, but not visited	27.5%	111	24.8%	45	26.4%	14	23.4%	19	37.4%	32
Visited	68.8%	277	73.7%	133	71.8%	39	65.3%	53	59.9%	52
(Not heard of)	3.7%	15	1.5%	3	1.8%	1	11.3%	9	2.6%	2
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Gosport Gallery										
Heard of, but not visited	38.1%	153	42.3%	76	20.5%	11	34.0%	28	44.2%	38
Visited	42.2%	170	45.0%	81	64.6%	35	33.5%	27	30.5%	26
(Not heard of)	19.7%	79	12.7%	23	14.9%	8	32.5%	26	25.3%	22
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q19 Where do you work?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Eastleigh	0.9%	3	0.6%	1	0.0%	0	0.0%	0	2.8%	2
Fareham	11.5%	46	10.1%	18	5.7%	3	17.9%	15	12.3%	11
Gosport	28.7%	116	38.2%	69	30.7%	17	13.2%	11	22.0%	19
Havant	0.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Locks Heath	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portchester	0.3%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Portsmouth	6.7%	27	9.1%	16	2.3%	1	5.5%	4	5.7%	5
Southampton	1.7%	7	1.3%	2	0.0%	0	2.7%	2	2.4%	2
Southsea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waterlooville	0.6%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Winchester	0.3%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Work from home	3.7%	15	3.5%	6	3.3%	2	3.9%	3	4.1%	4
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Alverstoke	0.3%	1	0.0%	0	1.5%	1	0.6%	0	0.0%	0
Basingstoke	0.9%	4	0.0%	0	0.0%	0	3.0%	2	1.2%	1
Birmingham	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Chichester	0.8%	3	0.6%	1	0.0%	0	2.7%	2	0.0%	0
Cosham	1.0%	4	1.2%	2	1.6%	1	1.2%	1	0.0%	0
Hamble-le-Rice	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Hedge End	0.4%	2	0.0%	0	0.0%	0	1.3%	1	0.7%	1
Lee-On-Solent	2.0%	8	0.0%	0	0.7%	0	8.7%	7	0.7%	1
London	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Middle Wallop	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Segensworth	1.1%	4	1.3%	2	0.7%	0	0.6%	0	1.2%	1
Stubbington	0.9%	3	0.0%	0	0.0%	0	0.0%	0	4.0%	3
Varies	1.1%	4	1.3%	2	1.5%	1	0.0%	0	1.2%	1
Whiteley	0.7%	3	0.0%	0	0.7%	0	0.0%	0	2.8%	2
Woking	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
(Don't work)	35.5%	143	30.5%	55	49.9%	27	35.6%	29	36.8%	32
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q20 Do you take part in any of the following leisure or cultural activities ? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Cinema	65.9%	265	71.9%	130	70.2%	38	65.1%	53	51.2%	44
Ten pin bowling	44.5%	179	48.8%	88	42.1%	23	39.7%	32	41.6%	36
Gym / health & fitness club	25.0%	101	32.9%	59	19.2%	11	14.5%	12	21.9%	19
Swimming	45.0%	181	52.0%	94	36.1%	20	45.2%	37	36.0%	31
Pubs / clubs	52.0%	210	58.5%	105	44.5%	24	46.7%	38	48.3%	42
Restaurants	77.5%	312	77.8%	140	81.6%	45	73.3%	60	78.1%	68
Bingo	8.1%	33	5.1%	9	3.0%	2	13.6%	11	12.6%	11
Theatres	42.8%	172	39.9%	72	63.4%	35	42.5%	35	35.9%	31
Museums / art gallery	41.9%	169	42.4%	77	60.3%	33	37.6%	31	33.0%	29
Sailing / Marine Related Activities	9.4%	38	7.8%	14	16.2%	9	14.1%	11	3.9%	3
Ice Skating	21.3%	86	22.2%	40	25.2%	14	18.9%	15	19.0%	16
(None of these)	8.5%	34	6.7%	12	5.9%	3	15.9%	13	6.7%	6
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q21 Where do you go most often to visit the cinema ?
Those who visit the cinema at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Odeon, Port Solent, Portsmouth	22.4%	59	27.1%	35	24.3%	9	15.9%	8	14.8%	7
Odeon, West Quay Road, Southampton	2.1%	5	4.2%	5	0.0%	0	0.0%	0	0.0%	0
Reel Cinema, Fareham	38.4%	101	29.5%	38	25.9%	10	53.4%	28	58.0%	26
The Point, Eastleigh	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Vue, Gunwharf Quays, Portsmouth	36.2%	96	38.3%	50	49.8%	19	30.7%	16	24.4%	11
Portchester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
The Ritz, Gosport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Weighted base:		264		130		38		52		44
Sample:		239		66		64		61		48

Q22 Where do you go most often to go ten pin bowling ?
Those who go ten pin bowling at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Bowlplex Gunwharf, Portsmouth	14.9%	26	19.7%	17	33.3%	8	2.1%	1	3.0%	1
Go Bowling, Fareham	84.7%	150	80.3%	70	66.7%	15	96.0%	30	97.0%	34
Tenpin Southampton	0.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Weighted base:		177		87		23		32		35
Sample:		140		40		33		36		31

Q23 Where do you go most often to visit the gym / health & fitness club ?
Those who visit the gym at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Leisure Centre	3.8%	4	3.5%	2	8.1%	1	0.0%	0	4.0%	1
Fitness First, Portchester	0.5%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	0
Gosport Health and Fitness Centre	18.4%	17	25.4%	15	0.0%	0	5.7%	0	10.5%	2
Gosport Leisure Centre	49.8%	47	53.6%	32	33.2%	3	34.3%	3	54.0%	9
LA Fitness, Pulheim Parade, Fareham	3.2%	3	3.5%	2	3.6%	0	0.0%	0	3.6%	1
Lee-on-the-Solent Tennis and Squash Club	2.6%	2	0.0%	0	8.1%	1	20.2%	2	0.0%	0
Lloyd Vine Leisure, Gosport	1.7%	2	1.8%	1	0.0%	0	0.0%	0	3.6%	1
Miracles, Gosport	4.0%	4	2.2%	1	8.1%	1	20.2%	2	0.0%	0
Victoria Swimming Centre, Portsmouth	1.1%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0
247Fitness, Fareham	0.5%	0	0.0%	0	0.0%	0	5.7%	0	0.0%	0
Active4Less, Havant	0.4%	0	0.0%	0	3.6%	0	0.0%	0	0.0%	0
Brune School, Military Road, Gosport	0.4%	0	0.0%	0	3.6%	0	0.0%	0	0.0%	0
Collingwood	0.5%	0	0.0%	0	0.0%	0	5.7%	0	0.0%	0
Curves, Gosport	2.1%	2	2.5%	1	5.0%	1	0.0%	0	0.0%	0
Fitness First, Fareham	1.1%	1	0.0%	0	0.0%	0	0.0%	0	6.5%	1
HMS Collingwood, Portsmouth	0.7%	1	0.0%	0	0.0%	0	8.1%	1	0.0%	0
HMS Sultan, Gosport	0.9%	1	0.0%	0	8.2%	1	0.0%	0	0.0%	0
Henry Cort Community College, Fareham	2.0%	2	0.0%	0	18.6%	2	0.0%	0	0.0%	0
New Images, Gosport	6.2%	6	5.8%	3	0.0%	0	0.0%	0	14.9%	2
Weighted base:		94		59		10		8		16
Sample:		74		27		18		13		16

Q24 Where do you go swimming most often ?

Those who go swimming at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Cannons, Northern Parade, Portsmouth	1.4%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Fareham Leisure Centre	9.7%	17	3.6%	3	10.4%	2	20.2%	6	17.0%	5
Gosport Health and Fitness Centre	13.5%	24	18.6%	17	1.9%	0	11.0%	3	7.7%	2
Gosport Leisure Centre	49.3%	86	53.8%	50	55.0%	11	44.0%	14	37.4%	11
Hillsea Lido, Portsmouth	3.1%	5	5.8%	5	0.0%	0	0.0%	0	0.0%	0
LA Fitness, Pulheim Parade, Fareham	4.3%	7	5.8%	5	1.9%	0	0.0%	0	5.5%	2
Lee-on-the-Solent Tennis and Squash Club	0.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Lloyd Vine Leisure, Gosport	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Miracles, Gosport	2.2%	4	1.4%	1	4.3%	1	5.4%	2	0.0%	0
Pyramids Leisure Centre, Portsmouth	0.6%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Romsey Rapids, Romsey	1.4%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Aquababies, Lee-on-Solent	0.3%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Brune Park, Gosport	0.8%	1	0.0%	0	4.3%	1	0.0%	0	1.9%	1
HMS Collingwood, Portsmouth	1.6%	3	0.0%	0	8.6%	2	3.7%	1	0.0%	0
Holbrook Leisure Centre, Gosport	9.6%	17	4.8%	4	13.6%	3	5.0%	2	26.8%	8
Private Pool, Lee-on-Solent	0.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Taro Leisure Centre, Petersfield	0.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Titchfield	0.6%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0
Weighted base:		175		94		19		31		31
Sample:		147		44		30		38		35

Q25 What town centre do you visit most often for pubs / clubs ?

Those who visit pubs / clubs at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	12.0%	23	6.3%	6	18.4%	4	0.0%	0	31.7%	13
Gosport Town Centre	39.0%	75	54.7%	50	33.8%	7	24.4%	9	19.5%	8
GunWharf Quays, Portsmouth Harbour	23.0%	44	23.0%	21	39.8%	9	17.2%	6	18.7%	8
Lee-on-the-Solent District Centre	8.6%	16	1.1%	1	2.3%	1	38.3%	14	2.8%	1
Portsmouth Town Centre	13.0%	25	13.8%	13	3.7%	1	6.9%	2	21.6%	9
Southampton Town Centre	0.3%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Southsea Town Centre	0.5%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Alverstoke	0.2%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0
Bridgemary	0.9%	2	0.0%	0	0.0%	0	0.0%	0	4.1%	2
Lee-on-Solent	0.2%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Portchester	1.3%	2	0.0%	0	0.0%	0	6.9%	2	0.0%	0
Rowner	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Stubbington	0.3%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Titchfield	0.3%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Weighted base:		191		92		22		36		41
Sample:		165		46		35		39		45

Q26 What town centre do you visit most often for restaurants ?
Those who visit restaurants at Q20 AND Excl. Nulls and Internet

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fareham Town Centre	17.7%	51	10.1%	13	14.7%	6	21.9%	12	32.7%	20
Gosport Town Centre	29.1%	84	36.3%	48	27.4%	11	26.7%	15	16.8%	10
GunWharf Quays, Portsmouth Harbour	24.4%	70	29.8%	39	29.9%	12	16.9%	9	15.4%	9
Lee-on-the-Solent District Centre	10.4%	30	4.9%	7	9.4%	4	22.2%	12	12.4%	7
Port Solent	1.2%	3	1.6%	2	2.0%	1	0.0%	0	0.8%	0
Portsmouth Town Centre	9.6%	28	16.2%	21	6.4%	3	0.0%	0	6.2%	4
Southampton Town Centre	1.5%	4	0.0%	0	4.6%	2	1.1%	1	3.3%	2
Southsea Town Centre	0.3%	1	0.0%	0	1.1%	0	0.9%	0	0.0%	0
Stoke Road District Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Brighton	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Chichester	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Droxford	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Holbrook	0.5%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
London	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Newcastle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Portchester	0.9%	2	0.0%	0	0.0%	0	4.5%	2	0.0%	0
Stubbington	0.4%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Titchfield	1.2%	3	0.0%	0	1.1%	0	0.9%	0	4.0%	2
Titchwell	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Whiteley	0.7%	2	0.0%	0	0.0%	0	2.0%	1	1.8%	1
Wickham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Weighted base:		288		132		41		55		60
Sample:		274		68		72		69		65

Q27 How often do you visit Gosport town centre in the evenings ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Everyday	0.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
4-6 days a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	0.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
1 day a week	2.1%	9	2.9%	5	1.5%	1	2.5%	2	0.5%	0
Once every 2 weeks	1.7%	7	0.6%	1	3.5%	2	0.0%	0	4.5%	4
Once every month	15.3%	62	24.1%	43	5.0%	3	7.5%	6	10.9%	9
Once a quarter	7.2%	29	5.1%	9	8.2%	4	8.0%	7	10.4%	9
Less often than once a quarter	15.1%	61	13.8%	25	16.5%	9	9.5%	8	22.1%	19
Never	57.0%	230	51.6%	93	65.3%	36	70.7%	57	50.1%	43
(Don't know)	0.7%	3	0.0%	0	0.0%	0	1.8%	1	1.5%	1
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

Q28 Why do you never visit Gosport town centre in the evenings? [MR]
Those who said Never at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Fear of Crime	13.0%	30	15.6%	15	17.2%	6	3.8%	2	15.9%	7
Traffic Congestion	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to Park	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Poor Accessibility by bus	2.2%	5	0.0%	0	2.6%	1	6.0%	3	1.3%	1
Poor Accessibility by ferry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of restaurants	4.2%	10	7.8%	7	2.3%	1	1.9%	1	1.1%	0
Lack of Bars	3.6%	8	6.7%	6	0.0%	0	3.8%	2	0.0%	0
Nothing to do	37.8%	87	33.8%	31	67.5%	24	26.9%	15	36.5%	16
Better Facilities Elsewhere	1.9%	4	1.1%	1	2.3%	1	4.3%	2	0.0%	0
Too Expensive	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Poor Lighting	0.8%	2	1.4%	1	0.0%	0	0.8%	0	0.0%	0
Other	4.6%	11	2.6%	2	3.6%	1	7.4%	4	6.2%	3
Nothing	22.9%	52	26.4%	25	8.0%	3	30.6%	18	17.4%	8
I have no reason to	5.5%	13	6.3%	6	5.9%	2	5.1%	3	4.0%	2
It is too far away	3.4%	8	0.0%	0	1.0%	0	7.0%	4	7.9%	3
I have children	3.8%	9	1.1%	1	4.6%	2	6.2%	4	5.5%	2
I am too old	1.3%	3	0.0%	0	0.0%	0	1.0%	1	5.6%	2
I am disabled	1.0%	2	0.0%	0	1.4%	1	1.2%	1	2.7%	1
(Don't Know)	1.8%	4	1.4%	1	1.3%	0	0.0%	0	5.3%	2
Weighted base:		230		93		36		57		43
Sample:		257		54		72		72		59

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Male	35.3%	142	38.1%	69	23.6%	13	35.8%	29	36.6%	32
Female	64.7%	261	61.9%	112	76.4%	42	64.3%	52	63.4%	55
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

AGE Could I ask how old you are ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
18 to 24	5.5%	22	5.5%	10	6.3%	3	0.0%	0	10.2%	9
25 to 34	19.4%	78	21.1%	38	6.9%	4	24.3%	20	19.4%	17
35 to 44	21.9%	88	23.7%	43	16.7%	9	21.3%	17	21.9%	19
45 to 54	17.7%	71	22.5%	41	15.3%	8	16.9%	14	10.1%	9
55 to 64	13.3%	54	10.5%	19	21.4%	12	11.4%	9	15.7%	14
65 +	21.2%	85	16.7%	30	33.4%	18	21.2%	17	22.7%	20
(Refused)	1.0%	4	0.0%	0	0.0%	0	4.9%	4	0.0%	0
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

EMP Which of the following best describes the chief wage earner of your household's current employment situation ? [PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Working full time	59.4%	240	66.9%	121	38.0%	21	55.1%	45	61.5%	53
Working part time	9.2%	37	7.8%	14	8.2%	4	11.0%	9	11.1%	10
Unemployed	3.3%	13	4.2%	8	3.5%	2	4.6%	4	0.0%	0
Retired	25.2%	101	16.8%	30	49.7%	27	25.0%	20	27.4%	24
A housewife	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A student	1.9%	8	4.3%	8	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.0%	4	0.0%	0	0.7%	0	4.3%	4	0.0%	0
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

CAR How many cars does your household own or have the use of ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
None	13.1%	53	15.0%	27	5.8%	3	13.5%	11	13.5%	12
One	50.8%	205	51.6%	93	50.8%	28	43.6%	35	56.0%	48
Two	28.9%	117	27.8%	50	34.1%	19	31.6%	26	25.3%	22
Three or more	5.2%	21	4.8%	9	5.9%	3	6.4%	5	4.5%	4
(Refused)	2.0%	8	0.8%	1	3.4%	2	4.9%	4	0.7%	1
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

INC Approximately what is your total household income ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
£0 - £14,999	13.8%	56	17.6%	32	10.7%	6	12.2%	10	9.4%	8
£15,000 - £19,999	4.7%	19	2.5%	4	7.6%	4	7.0%	6	5.5%	5
£20,000 - £29,999	9.9%	40	13.3%	24	4.4%	2	8.1%	7	7.9%	7
£30,000 - £39,999	9.4%	38	12.7%	23	7.3%	4	5.6%	5	7.6%	7
£40,000 - £49,999	7.5%	30	5.3%	10	15.5%	9	6.4%	5	7.8%	7
£50,000 - £59,999	5.8%	23	4.0%	7	4.7%	3	1.9%	2	13.9%	12
£60,000 - £69,999	2.5%	10	1.7%	3	1.5%	1	3.8%	3	3.7%	3
£70,000 - £79,999	0.6%	2	0.6%	1	1.6%	1	0.6%	0	0.0%	0
£80,000 - £89,999	1.5%	6	1.3%	2	0.7%	0	1.4%	1	2.4%	2
£90,000 - £99,999	0.5%	2	0.6%	1	0.0%	0	1.3%	1	0.0%	0
£100,000 - £149,999	1.0%	4	0.6%	1	1.5%	1	2.5%	2	0.0%	0
£150,000+	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
(Don't know / refused)	42.6%	172	39.8%	72	43.7%	24	49.2%	40	41.7%	36
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

ETH The following question will be used in a statistical format only, and will help us to assess diverse needs and ensure all have access to our services. What is your ethnic background ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
White (British / Irish / Other)	96.3%	388	98.8%	178	95.1%	52	91.7%	75	96.2%	83
Black / Black British (Caribbean / African / other black)	0.9%	4	0.6%	1	0.0%	0	1.3%	1	1.9%	2
Asian / Asian British (Indian / Pakistani / Bangladeshi / Other Asian)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mixed (any mixed category)	0.5%	2	0.0%	0	1.5%	1	0.0%	0	1.2%	1
Chinese	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	2.3%	9	0.6%	1	3.4%	2	7.0%	6	0.7%	1
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Zone 1	44.8%	180	100.0%	180	0.0%	0	0.0%	0	0.0%	0
Zone 2	13.6%	55	0.0%	0	100.0%	55	0.0%	0	0.0%	0
Zone 3	20.2%	81	0.0%	0	0.0%	0	100.0%	81	0.0%	0
Zone 4	21.5%	87	0.0%	0	0.0%	0	0.0%	0	100.0%	87
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101

PC Postcode

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
PO121	10.4%	42	23.1%	42	0.0%	0	0.0%	0	0.0%	0
PO122	13.6%	55	0.0%	0	100.0%	55	0.0%	0	0.0%	0
PO123	9.6%	39	21.5%	39	0.0%	0	0.0%	0	0.0%	0
PO124	24.8%	100	55.3%	100	0.0%	0	0.0%	0	0.0%	0
PO130	21.5%	87	0.0%	0	0.0%	0	0.0%	0	100.0%	87
PO138	9.4%	38	0.0%	0	0.0%	0	46.5%	38	0.0%	0
PO139	10.8%	43	0.0%	0	0.0%	0	53.5%	43	0.0%	0
Weighted base:		403		180		55		81		87
Sample:		403		101		100		101		101