

TABLE 1: ALL CONVENIENCE GOODS - TOTAL TURNOVER ALLOWING FOR INFLOW
Including 'inflow' from outside Study Area

	Inflow from outside	2019	2024	2029	2034	2036
Gosport Town Centre						
Iceland, Walpole Road, Gosport	5%	£1.3	£1.3	£1.3	£1.3	£1.3
Morrisons, Walpole Road, High Street, Gosport	5%	£28.4	£28.6	£29.0	£29.2	£29.4
Other shops	5%	£2.1	£2.1	£2.1	£2.1	£2.1
Sub Total		£31.8	£32.0	£32.4	£32.6	£32.8
Stoke Road District Centre						
Waitrose, Stoke Road, Gosport	5%	£12.8	£12.9	£13.1	£13.2	£13.3
Lee-on-the-Solent District Centre						
Tesco Express, Pier Street, Lee-on-Solent	5%	£1.0	£1.0	£1.0	£1.0	£1.0
Co-op, Cherque Farm, Twyford Drive Lee-on-the-Solent	5%	£5.2	£5.3	£5.3	£5.3	£5.3
Other shops	5%	£1.7	£1.7	£1.8	£1.8	£1.8
Sub Total		£7.9	£8.0	£8.0	£8.0	£8.0
Out of Centre						
Aldi, Mumby Road, Gosport	5%	£13.6	£13.6	£13.7	£13.8	£13.8
Asda, Dock Road, Gosport	5%	£41.3	£41.4	£41.8	£42.0	£42.1
Co-op, Petrol Solent, Fareham Road	5%	£0.3	£0.3	£0.3	£0.3	£0.3
The Food Warehouse (Iceland), Brockhurst Gate	5%	£1.8	£1.8	£1.8	£1.9	£1.9
Lidl, Brockhurst Gate, Gosport	5%	£15.3	£15.4	£15.5	£15.6	£15.6
M&S Foodhall Brockhurst Gate	5%	£3.9	£3.9	£4.0	£4.0	£4.0
Tesco Express, Carless Close, Rowner	1%	£3.2	£3.3	£3.3	£3.3	£3.3
Sub Total		£79.4	£79.8	£80.5	£80.9	£81.1
Neighbourhood Centres						
Co-op, Gregson Avenue, Bridgemyra	1%	£0.8	£0.8	£0.8	£0.8	£0.8
Co-op, Palmyra Road, Elson	1%	£1.1	£1.1	£1.1	£1.1	£1.1
Co-op, Forton Road, Gosport	1%	£1.7	£1.7	£1.7	£1.7	£1.7
Co-op, Privett Road, Gosport	1%	£1.0	£1.0	£1.0	£1.0	£1.0
Co-op, Rowner Road, Gosport	1%	£1.0	£1.0	£1.0	£1.1	£1.1
McColl's, Carisbrooke Road, Gosport	1%	£0.9	£0.9	£1.0	£1.0	£1.0
One Stop, Elson Road, Gosport	1%	£0.5	£0.5	£0.5	£0.5	£0.5
One Stop, Village Road, Gosport	1%	£0.8	£0.9	£0.9	£0.9	£0.9
Lidl, Forton Road, Gosport	1%	£4.1	£4.1	£4.1	£4.1	£4.1
Tesco Express, Forton Road, Gosport	1%	£3.5	£3.5	£3.6	£3.6	£3.6
Tesco Superstore, Alver Village Square	5%	£30.1	£30.4	£30.7	£30.9	£31.0
Other shops	1%	£1.8	£1.8	£1.9	£1.9	£1.9
Sub Total		£47.4	£47.8	£48.2	£48.5	£48.7
TOTAL TURNOVER		£179.2	£180.5	£182.1	£183.3	£183.8

Note: Assume constant market shares over forecast period.

TABLE 2: PERFORMANCE OF KEY FOODSTORES AGAINST COMPANY BENCHMARK TURNOVER

Foodstore	Total Net Sales Area (sqm)	% Convenience Floorspace	Convenience Net Sales Area	Sales Density (p/m)	Benchmark Turnover (€m)	Survey Turnover (€m)	Difference from Survey Turnover (€m)
Iceland, Walpole Road, Gosport	445	95%	423	7562	£3.2	£1.3	-£1.9
Morrisons, Walpole Road, High Street, Gosport	2,299	80%	1839	13283	£24.4	£28.4	£4.0
Co-op, Cherque Farm, Twyford Drive Lee-on-the-Solent	530	70%	371	8668	£3.2	£5.2	£2.0
Tesco Express, Pier Street, Lee-on-Solent	229	95%	217	15811	£3.4	£1.0	-£2.5
Waitrose, Stoke Road, Gosport	1,024	90%	922	11031	£10.2	£12.8	£2.6
Lidl, Forton Road, Gosport	846	90%	761	9729	£7.4	£4.1	-£3.3
Tesco Superstore, Alver Village Square	2,375	65%	1544	10979	£16.9	£30.1	£13.2
Aldi, Mumby Road, Gosport	1240	80%	992	12010	£11.9	£13.6	£1.7
Asda, Dock Road, Gosport	2914	60%	1748	10978	£19.2	£41.3	£22.1
The Food Warehouse (Iceland), Brockhurst Gate	800	90%	720	7562	£5.4	£1.8	-£3.7
Lidl, Brockhurst Gate, Gosport	1506	80%	1205	9729	£11.7	£15.3	£3.6
M&S Foodhall Brockhurst Gate	715.4	90%	644	9747	£6.3	£3.9	-£2.3

N: Floorspace of existing foodstores and convenience stores obtained from various sources including the 2007 Gosport Retail, Leisure and Office Study, planning application documents, and the Valuation Office Agency.

Sales densities based on Mintel Retail Rankings (2017 prices) and projected to 2019 values based on efficiency rates for existing floorspace derived from Table 3a ("constant floorspace") Experian Business Strategies' Retail Planning Briefing Note 16 (December 2018). An allowance is made for VAT (20%).

TABLE 3: COMMITTED CONVENIENCE GOODS FLOORSPACE
(i.e. with planning permission or under construction at the time of preparing the capacity assessment)

Scheme	Planning Ref	Convenience Floorspace		Sales Density 2019 (£ per sqm)	Turnover (£m)				
		Gross sqm	Net Sales sqm		2019	2024	2029	2034	2036
Local centre, Land at Former HMS Daedalus - Outline planning for 1,075sqm for Use Classes A1, A2, A3, and/or A4	11/00282/OU T	275	193	£12,000	£2.3	£2.36	£2.41	£2.45	£2.47
TOTAL TURNOVER OF COMMITTED CONVENIENCE FLOORSPACE:					£2.3	£2.4	£2.4	£2.5	£2.5

Source: Gosport Borough Council, planning application portal.

Notes: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

Turnover projections based on efficiency rates for existing floorspace derived from Table 3a ("constant floorspace" scenario), Experian Business Strategies' Retail Planning Briefing Note 16 (December 2018).

TABLE 4: GOSPORT BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£179.2	£180.5	£182.1	£183.3	£183.8
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£179.2	£183.0	£186.7	£190.5	£192.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£2.5	-£4.5	-£7.1	-£8.1
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£2.4	£2.4	£2.5	£2.5
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£4.9	-£7.0	-£9.6	-£10.6
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-404	-561	-758	-826
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-577	-801	-1,083	-1,180
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-646	-897	-1,213	-1,322
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-922	-1,282	-1,733	-1,888

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the Borough's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by Table 3a ('Constant floorspace' scenario). Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and limited assortment discount (LAD) operators (e.g. Aldi, Lidl, Co-Op, Budgens, etc.).

TABLE 5: GOSPORT TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£31.8	£32.0	£32.4	£32.6	£32.8
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£31.8	£32.4	£33.1	£33.8	£34.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.4	-£0.7	-£1.1	-£1.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£0.4	-£0.7	-£1.1	-£1.3
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-35	-58	-87	-98
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-50	-82	-125	-140
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-56	-92	-140	-157
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-81	-132	-200	-224

TABLE 6: LEE-ON-THE-SOLENT DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£7.9	£8.0	£8.0	£8.0	£8.0
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£7.9	£8.1	£8.2	£8.4	£8.4
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	-£0.1	-£0.2	-£0.3	-£0.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£0.1	-£0.2	-£0.3	-£0.4
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-6	-16	-28	-31
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-8	-23	-39	-44
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-9	-25	-44	-50
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-13	-36	-63	-71

TABLE 7: STOKE ROAD DISTRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£12.8	£12.9	£13.1	£13.2	£13.3
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£12.8	£13.0	£13.3	£13.6	£13.7
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£0.2	-£0.2	-£0.4	-£0.4
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):	-	-£0.2	-£0.2	-£0.4	-£0.4
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-13	-19	-28	-31
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-18	-27	-40	-44
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-20	-30	-44	-49
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-29	-43	-63	-71

TABLE 8: ALVER VILLAGE NEIGHBOURHOOD CENTRE (TESCO) - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£30.1	£30.4	£30.7	£30.9	£31.0
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£30.1	£30.8	£31.4	£32.0	£32.3
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£0.4	-£0.7	-£1.1	-£1.3
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		-£0.4	-£0.7	-£1.1	-£1.3
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-30	-56	-89	-101
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-43	-80	-128	-144
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-48	-89	-143	-162
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-69	-127	-204	-231

TABLE 9: OTHER NEIGHBOURHOOD CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£17.3	£17.4	£17.6	£17.7	£17.7
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£17.3	£17.7	£18.0	£18.4	£18.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£0.3	-£0.5	-£0.7	-£0.8
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		-£0.3	-£0.5	-£0.7	-£0.8
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-22	-38	-58	-65
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-31	-54	-82	-93
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-35	-60	-92	-104
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-49	-86	-132	-148

TABLE 10: REST OF BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2019	2024	2029	2034	2036
STEP 1: FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£79.4	£79.8	£80.5	£80.9	£81.1
STEP 2: FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£79.4	£81.1	£82.7	£84.4	£85.0
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	-£1.3	-£2.2	-£3.5	-£4.0
STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m)					
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS (£m):		-£3.6	-£4.7	-£5.9	-£6.4
STEP 6: CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,157	£12,402	£12,652	£12,855
(ii) Net Floorspace Capacity (sq m):	-	-298	-375	-468	-500
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-426	-536	-669	-715
STEP 7: CAPACITY FOR NEW SUPERMARKET/ LAD FORMAT FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,500	£7,598	£7,751	£7,907	£8,035
(ii) Net Floorspace Capacity (sq m):	-	-477	-600	-749	-800
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-681	-858	-1,071	-1,143

TABLE 11: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE-FORMAT FLOORSPACE (NET SQ M)

Assume Equilibrium at 2018 and Constant Market Shares

	2024	2029	2034	2036
GOSPORT TOWN CENTRE	-35	-58	-87	-98
LEE-ON-THE-SOLENT DISTRICT CENTRE	-6	-16	-28	-31
STOKE ROAD DISTRICT CENTRE	-13	-19	-28	-31
ALVER VILLAGE NEIGHBOURHOOD CENTRE	-30	-56	-89	-101
ALL OTHER NEIGHBOURHOOD CENTRES	-22	-38	-58	-65
OUT OF CENTRE	-298	-375	-468	-500
TOTAL - SUPERSTORE FORMAT	-404	-561	-758	-826

TABLE 12: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERMARKET/ LIMITED ASSORTMENT DISCOUNTER (LAD) FORMAT FLOORSPACE (NET SQ M)

Assume Equilibrium at 2018 and Constant Market Shares

	2024	2029	2034	2036
GOSPORT TOWN CENTRE	-56	-92	-140	-157
LEE-ON-THE-SOLENT DISTRICT CENTRE	-9	-25	-44	-50
STOKE ROAD DISTRICT CENTRE	-20	-30	-44	-49
ALVER VILLAGE NEIGHBOURHOOD CENTRE	-48	-89	-143	-162
ALL OTHER NEIGHBOURHOOD CENTRES	-35	-60	-92	-104
OUT OF CENTRE	-477	-600	-749	-800
TOTAL - LOCAL SUPERMARKET / LAD FORMAT	-646	-897	-1,213	-1,322