Report

GVA
10 Stratton Street
London
W1J 8JR

Gosport Retail Study - Partial Update

Gosport Borough Council

September 2011

Prepared By .Susie Rolls........................... Status..Final..........................Date September 2011 ....

Reviewed By Chris Goddard .... Status..Final..........................Date September 2011 ....

For and on behalf of GVA Grimley Ltd

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1. Introduction

1.1 GVA undertook the Gosport Borough Council Retail Study in 2007 which forecast requirements for additional retail floorspace and provided a context for policies and proposals within the forthcoming Local Development Framework (LDF) for the Borough. GVA was subsequently instructed by the Rowner Regeneration Partnership in September 2007 to test the appropriateness of retail development proposals at Rowner in Gosport in the context of the Borough's retail strategy.

1.2 GVA has presently been instructed by the Council to revisit the 2007 Retail Study and update the baseline convenience goods capacity projections to take into account significant changes since the original study was completed, notably the effects of the recession and new developments which are coming forwards, including a new foodstore at Rowner. Drawing on the up-to-date baseline position, we are also presently instructed to asses the retail impact implications of potential additional convenience goods floorspace coming forward in the Borough in the context of PPS4 and the Council's emerging retail strategy.

1.3 This report is structured as follows:-

- **Section 2** provides a brief update of the 2007 Retail Study, highlighting changes in policy, the current health of the main centres and revised capacity forecasts for additional convenience goods floorspace;
- Drawing on our up-to-date review of retailing in the Borough, in **Section 3** we consider the impact implications of potential additional convenience floorspace coming forwards in the Borough over the LDF plan period. The main element focuses on the impacts of a large format foodstore but we also consider the appropriateness of smaller-scale convenience goods provision in the strategic areas of Haslar Peninsula and Daedalus;
- Finally, in **Section 4** we present our conclusions and recommendations.

2. Retail Study Update

Policy Context

2.1 This section sets out the relevant changes in national planning policy since the 2007 Retail Study was undertaken, focusing specifically on retail planning and policies for town centres. Such changes underpin the context for this partial update study.

PPS4: Planning for Sustainable Economic Growth (December 2009)

2.2 Planning Policy Statement 4 (PPS4) was published in December 2009 and replaces Planning Policy Statement 6 (PPS6: Planning for Town Centres), which informed the previous retail study. The central message of PPS4 is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:

- Focusing economic growth and development of main town centre uses[1] in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
- Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs for the entire community (particularly socially excluded groups).

2.3 PPS4 advises that Local Planning Authorities (LPAs) should plan positively for growth and development by assessing the need for further main town centre uses and ensuring there is capacity to accommodate them, and also to identify any deficiencies in the provision of convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.

[1] The main town centre uses, as defined within PPS4, are: 1. retail development; 2. leisure, entertainment facilities, and the more intensive sport and recreation uses; 3. offices; and 4. arts, culture and tourism development (Page 3, PPS4).

2.4 Under Policy EC5, LPAs should identify an appropriate range of sites to accommodate the identified need. LPAs should also identify the appropriate scale of development; apply the sequential approach; assess the impact of sites on existing centres; and consider the degree to which other considerations such as any physical regeneration benefits or increased investment in an area may be material to the choice of appropriate locations for development. In allocating sites, there is a presumption that the relevant key tests have been met at the plan-making stage.

2.5 EC5.2 relates to identifying sites for main town centre uses through a sequential approach to site selection. LPAs should identify sites that are suitable, available and viable; firstly within existing centres, secondly in edge of centre locations (with preference given to well connected site to the centre), and thirdly in out of centre sites (with preference given to sites well served by public transport and closest to existing centres).

2.6 To assess the impact of proposed locations for developments, LPAs are encouraged to take into account the impact considerations set out in Policy EC16. These comprise: the impact on existing, committed and planned investment in a centre or centres in the catchment area of the proposal; the impact on town centre vitality and viability including local consumer choice; the impact on allocated out-of-centre sites; the impact on centre turnover; the scale; and any locally important impacts defined by the LPA.

Draft National Planning Policy Framework (NPPF)

2.7 The Government published the draft National Planning Policy Framework (NPPF) for consultation in July 2011. The NPPF will replace the current suite of national Planning Policy Statements, Planning Policy Guidance notes and some Circulars with a single, streamlined document.

2.8 The NPPF will set out the Government's economic, environmental and social planning policies for England. Taken together, these policies articulate the Government's vision of sustainable development, which should be interpreted and applied locally to meet local aspirations. The presumption in the favour of sustainable development is central to the Framework's policy approach and operates with and through other policies throughout.

2.9 The draft NPPF continues to recognise that planning system is plan-led and Local Plans must aim to achieve the objective of sustainable development. This means they should be prepared on the basis that objectively assessed development should be met, unless adverse impacts of doing so would significantly and demonstrably outweigh the benefits.

2.10 Local Plans should be aspirational but realistic and based on adequate, up-to-date evidence. In the context of retail development, LPAs should use this evidence to assess the requirements for retail floorspace and the sufficiency and suitability of land to meet identified requirements, taking account of the role and function of existing centres and their capacity to accommodate new town centre development.

2.11 Consistent with PPS4, the NPPF maintains the sequential approach to site selection requiring LPAs to prefer application for retail uses to be located in town centres where practical, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. In applying the sequential approach, potential sites should be assessed for their availability, suitability and viability and for their ability to meet the full extent of assessed quantitative and qualitative needs.

2.12 The Draft NPPF also states that planning policies and decisions should assess the impact of retail proposals, including:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to ten years from the time the application is made.

Gosport Core Strategy: Preferred Options (2009)

2.13 The Council's Preferred Options (PO) report was published for consultation in September 2009. The Council is currently in the process of preparing its Final Submission Core Strategy which is due to be published at the end of 2011. This report will provide additional evidence to support the Council's retail policies and centre strategies.

2.14 In accordance with national policy, the Core Strategy will seek to provide and promote a range of quality retail and community facilities in locations that are easily accessible to serve all members of Gosport's communities. The Core Strategy PO maintains the current hierarchy of centres (as defined by the Local Plan, 2006), the only change being the merging of local and neighbourhood centres to form Local Centres.

2.15 The Council considers there is potential for a modest increase in the Borough's current market share, from 6% to 8% in the comparison retail sector and from 16% to 18% in the convenience retailer sector. This increased market share would require approximately 11,000 sqm net additional new retail floorspace[2] in the Borough which could take place within Gosport town centre as part of the redevelopment of the Gosport Waterfront.

2.16 Suggested Policy CS18 supports the improvement of existing centres, particularly Gosport town centre which is recognised as the primary centre in the Borough and the focus for new retail and services. The opportunity to expand the town centre to include the redevelopment of Gosport Waterfront (Strategic Area 1) is also supported. Overall, development which strengthens the vitality and viability of existing centres will be supported provided it meets the local criteria-based policy.

2.17 The Council has identified five strategic areas, the following of which are relevant to this report:

- **Strategic Area 1: Gosport Waterfront** – considered the best location in the Borough to be the main focus for new retail development (particularly comparison) given its proximity to Gosport town centre.
- **Strategic Area 2: Daedalus** – strategic business location, not considered suitable for significant retail as this is more appropriately placed in main centres. However a small amount of retail such as a small convenience store to serve the site may be considered appropriate.
- **Strategic Area 3: Haslar Peninsula** – buildings close to the main entrance of the Royal Hospital site could function as a new centre with communities facilities and a convenience store to serve the site and the local community;
- **Strategic Area 4: Rowner** – the Rowner Renewal Project will include 2,250 sqm net of total retail floorspace with an enhanced local centre with new facilities.

[2] The majority being comparison goods retail floorspace.

Existing Retail Provision

2.18 The Borough's retail hierarchy consists of Gosport town centre, two district centres (Stoke Road and Lee-on-the-Solent), five local centres and seventeen neighbourhood centres. Drawing on our own site visits of Gosport and Lee-on-the-Solent undertaken in July 2011, and secondary data sources including Experian Goad, we summarise our qualitative findings relating to the health and role of these centres. This will later feed into our impact assessment of additional convenience goods floorspace coming forward within the Borough.

Gosport town centre

2.19 The 2007 Study found Gosport to be a healthy centre which performed well under a number of key performance indicators (KPIs). Our more recent site visit of the centre (undertaken in July 2011) and our health check analysis below indicates that Gosport is still performing well and in line with its position in the retail hierarchy.

2.20 The town centre offers a good range of convenience and comparison shops and services with representation from a number of multiple retailers including Boots, Superdrug, Argos, Dorothy Perkins and New Look amongst others. Gosport High Street provides an attractive pedestrianised shopping environment for shoppers and the centre was busy at the time of the site visit.

2.21 Drawing on the Council's survey data (dated July 2011), Gosport comprises 160 retail units of which 13 (8%) are dedicated to the sale of convenience goods. This is directly in line with the national average according to Experian Goad. Closer analysis reveals that the convenience offer comprises several bakeries, newsagents, healthfood stores, shoe repairs and an off licence. There are no butchers, fishmonger or greengrocer units. However there is a twice weekly market which operates on Tuesdays and Saturdays, which includes stalls/vans selling fresh fruit and vegetables, meat and fish. There are also two supermarkets in the town centre, Morrisons and Iceland.

2.22 The 2,229 sqm net Morrisons store anchors the western end of the High Street. The in-store offer includes a delicatessen, café, hot food counter, pharmacy, fishmonger and butcher. The store also offers free car parking which allows customers to undertake linked trips between the store and the town centre. The store is likely to be a key attractor to the town centre and was very busy at the time of our site visit. However, the survey evidence indicates that store is currently underperforming (-27%) compared to our estimate of the company's average turnover.

2.23 Since 2009, the number of vacant units in the centre has fallen from 23 to 19 in July 2011. This equates to a current vacancy rate of 12% which is in line with the national average according to Experian Goad. There is a small concentration of eight vacant units located in the Gosport Shopping Precinct which is a noticeable problem area which would benefit from investment.

2.24 Overall, Gosport is still considered to be a healthy town centre. However there remains potential to improve its offer and secure investment which would help maintain its role and function moving forwards. The Morrisons store is likely to be a key attractor and we would therefore recommend that any proposals for new foodstore development within the catchment of the town centre is thoroughly assessed in line with the requirements of PPS4, to ensure that the vitality and viability of the town centre is not threatened in the future.

Lee-on-the-Solent District Centre

2.25 The 2007 Study found Lee-on-the-Solent to be performing relatively well in relation to a number of KPIs. Drawing on the Council's most recent survey of the centre and our own site visit, both undertaken in July 2011; the centre offers a good range of shops and services and has just five vacant units, equating to below average vacancy rate of 6%. However, it is important to note that in some circumstances such a low proportion of vacant units may also indicate a barrier to growth because there is limited room for retailers to expand or enhance their retail provision.

2.26 The centre has a good convenience goods offer, largely operated by independent retailers, which includes bakery, butchers, greengrocers, fishmongers and delicatessens amongst others. The main foodstore in the centre is the 530 sqm net Co-op, which also accommodates a small sub-Post Office. According to the survey results, this store is currently marginally undertrading (-8%) relative to our estimate based on company average.

2.27 However, it was evident from the 2006 household survey the centre is predominantly serving a top-up food shopping function, with local residents preferring to travel further afield to stores in Fareham and Gosport for their main food shopping. The 2007 Study considered that there was a need to enhance convenience goods floorspace in the centre to prevent trade leaking to other centres and support more sustainable shopping patterns.

2.28 Overall, Lee-on-the-Solent is still considered to be performing well although there remains scope to enhance convenience goods provision which well help reduce unsustainable expenditure leakage from the area.

Stoke Road District Centre

2.29 Stoke Road is a long, linear centre located in close proximity to Gosport town centre. The Council's most recent audit of the centre, in July 2011, indicates that the centre continues to comprise a good comparison retail offer, largely operated by independent retailers. The centre is largely dominated by service uses which occupy 50% of all units.

2.30 The centre has below average convenience goods provision with just three units operating within this category, although one of these units is Waitrose which anchors the centre. The Waitrose has a floorspace of c.1,024 sqm net and its in-store offer includes a delicatessen, bakery and butcher. However, the survey evidence indicates that, like several other main foodstores in the Borough this store is also underperforming (-21%).

2.31 The centre continues to suffer from a high number of vacancies. The Council's survey identified 20 vacant units which equates to an above average vacancy rate of 21%. The centre is considered somewhat vulnerable in this respect.

Out-of-Centre Retail Provision

2.32 The only out-of-centre foodstore within the Borough is the Asda food superstore located on Dock Road on the Cranbourne Industrial Estate, accessed from South Street. The store opened in 1977 and has a net floorspace of c.2,914 sqm net. There is 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, and footfall was strong at the time of our site visit in July 2011.

2.33 According to the survey results, the Asda is the only main foodstore in the Borough which is overtrading (+30%) compared to our estimate based on company average.

Existing Shopping Patterns

2.34 In order to review the implications of new convenience goods proposals and claw-back of trade it is necessary to analyse in detail existing shopping patterns in the Borough, which broadly corresponds with Zones 1-4 (see Appendix I).

2.35 As there have been no significant changes in convenience goods provision the Borough since the 2007 Study, the original household survey remains relevant for the purposes of this update. Table 2.1 demonstrates where residents are predominantly going for their 'main' and 'top up' convenience goods shopping.

2.1 Zones 1- 4 Responses for 'Main' and 'Top-Up' Food Shopping

	Zone 1		Zone 2		Zone 3		Zone 4	
	Main Food (%)	Top Up (%)	Main Food (%)	Top Up (%)	Main Food (%)	Top Up (%)	Main Food (%)	Top Up (%)
Key Stores in Gosport Borough*								
Morrisons, Gosport	18.7	16.3	20.4	15.9	9.7	4.3	10.4	5.9
Asda, Dock Road	48.0	21.8	46.6	14.8	25.8	10.3	12.3	4.0
Waitrose, Stoke Rd	2.9	2.7	19.4	29.5	4.0	3.4	1.9	-
Co-op, Lee-on-the-Solent	-	0.7	-	-	2.4	30.8	-	-
Market Share (retention)	**69.6**	**41.5**	**86.4**	**60.2**	**41.9**	**48.8**	**24.6**	**9.9**
Key Competing Stores outside Gosport Borough								
Asda, Fareham	18.7	2.0	1.9	-	41.9	8.5	54.7	21.8
Sainsbury's, Fareham	0.6	-	1.9	1.1	6.5	0.9	3.8	1.1
Tesco, Portsmouth	2.3	-	1.0	1.1	0.8	-	2.8	1.0
Market Share (Leakage)	**21.6**	**2.0**	**4.8**	**2.2**	**49.2**	**9.4**	**61.3**	**23.9**

Source: Gosport Telephone Survey, January 2007

*does not include all convenience stores e.g. local shops in Gosport so overall retention figures will be higher than stated, particularly for top-up food shopping.

2.36 It is evident from the above that the main stores in the Borough already retain a relatively high proportion of main-food / top-up convenience goods expenditure generated in Zones 1 (70% / 42%) and 2 (86% / 60%) and to a lesser degree in Zone 3 (42% / 49%).

Residents in Zone 3 however, will soon benefit from the opening of two new Tesco stores in Rowner and Lee-on-the-Solent which will help to claw back expenditure to this zone and increase overall market share in Borough. This is discussed in more detail later.

2.37 The Borough's main foodstores retain less main-food / top-up convenience goods expenditure generated within Zone 4 (25% / 10%). However, this reflects the proximity the Asda, Fareham, which attracts 55% of residents' main-food and 22% top-up food shopping spend generated within this zone. Residents located in the very north of Zone 4 should not be expected to travel further south to the large foodstores situated in Gosport for their main food shopping if their needs are being sustainably met by a foodstore outside the Borough. On this basis, we consider there is likely to be only limited scope to claw back expenditure currently leaking from this zone.

2.38 Based on the above, and taking into consideration the anticipated trade draw of the new Tesco at Rowner and Lee-on-the-Solent, we consider there is most likely only scope for to claw back spend currently leaking to stores beyond the Borough, within Zones 1 and 2 and to a lesser degree from Zones 3 and 4.

Performance of Existing Stores

2.39 In terms of considering the impact of additional convenience retail development later in this report, it is important to comment on the performance of existing foodstores. Based on the 2007 survey of shopping patterns, both the Morrisons and Iceland foodstores in Gosport town centre, the Waitrose in Stoke Road district centre and the Co-op in Lee-on-the-Solent are underperforming compared to company average sales, although in qualitative terms these stores appeared busy and well used at the time of our recent site visits.

2.40 As highlighted above, the out-of-centre Asda foodstore is performing well above expected company average sales. It is important that qualitative factors are also taken into consideration when reviewing store performance, and telephone survey results can be subject to margins of error at the more local level, although it does give a reasonable broad overview of the performance and function of a store.

Capacity Forecasts

2.41 The 2007 Retail Study incorporated a comprehensive review of retailing needs in the Borough forecasting the amount of floorspace that needs to be allocated for future retail development over the LDF period. Drawing on the 2006 household survey evidence, we have updated the convenience capacity forecasts to take into account relevant changes since the original study was completed, notably the effects of the recession and new developments which have come forward, including a new foodstore at Rowner and an extension to the Lidl on Forton Road.

2.42 We have also revised the population forecasts, adopting Hampshire County Council's long-term forecasts (2009) to reflect the most up-to-date position on planned growth in the sub-region. These projections forecast an overall decline in Gosport's population from 80,310 residents in 2011 to 77,707 residents in 2028 (-3.2%).

Convenience Goods Capacity

2.43 After taking into account the performance of existing convenience goods provision and identified commitments (Table 21, Appendix I), we do not identify any capacity to support additional convenience goods floorspace in the Borough over the period to 2028 (Table 22, Appendix I).

2.44 We have re-tested the effects on capacity assuming an increase in the Borough's overall market share in the survey area from 16% to 18% which is consistent with local policy objectives (Table 23, Appendix I). However, after taking into account existing commitments we still do not identify any capacity for additional convenience goods floorspace over the period to 2028. It would be necessary to increase the Borough's convenience retail market share to 21% before any capacity is likely to arise over the short-medium term (Table 24, Appendix 1).

2.45 It is important that this figure is interpreted correctly as the above market share figures are diluted by the fact that the survey area covers such a large area. Within the Borough's core zones (Zones 1-4), as we would expect, the market share is much higher as stores within this area retain approximately 63% of convenience goods expenditure generated within these zones.

2.46 This would suggest that there is still some scope to further increase market share across this area. However given the already high levels of trade retention in Zones 1 and 2 (as demonstrated in Table 2.1 above), further increasing market share in these zones is likely to be difficult.

2.47 There is evident leakage of trade from the outer zones (Zones 3 and 4); although to some degree this should be expected given the proximity of competing provision in Fareham. It would be unsustainable to expect those living in the north of Zone 4 to travel to stores located within the Borough, if their needs can be more sustainably met by alternative provision located outside the Borough. New foodstore provision in this zone would undoubtedly help claw back trade to the Borough. However this would be to the expense of stores in Fareham (including the planned new Tesco store) and Gosport. The impact implications of such development are considered in more detail in the following section.

3. Impact Assessment

3.1 Clearly the 2007 Retail Study and our update of the capacity forecasts identifies no capacity to support additional convenience goods floorspace in the Borough over the period to 2028, based on current market share. As highlighted in the previous section, there is considered to be only modest scope to claw back spend currently leaking to other foodstores outside the Borough. Any additional convenience goods floorspace, over and above existing commitments, is therefore likely to result in a degree of impact on the network of existing centres.

3.2 In this section we consider the retail impact implications of additional convenience goods development coming forwards in the Borough. Our assessment considers, in turn, the impacts that are likely to arise in relation to each of the six criteria listed in Policy EC16 of PPS4.

3.3 We have been asked by the Council to examine the following development scenarios:

i) A large format foodstore coming forwards on one of four identified sites in the Borough;

ii) New convenience retail floorspace at the Royal Hospital site in the Haslar Peninsula;

iii) New convenience retail floorspace coming forwards as part of the mixed-used redevelopment of the Daedalus site.

3.4 The findings in respective of each of the above are presented, in turn, below.

i) Large Format Foodstore Development

3.5 Based on information provided by the Council, we have assessed the theoretical implications of two varying scales of new foodstore development:-

Scenario 1: 2,788 sqm net (30,000 sq ft); and

Scenario 2: 5,576 sqm net (60,000 sq ft).

3.6 To set the context for the size of foodstore set out above, the out-of-centre Asda in Gosport is 2,914 sqm net; the Morrisons in Gosport town centre is 2,299 sqm net; the

Waitrose in Stoke Road district centre is 1,024 sqm net; and the Co-Op in Lee-on-the-Solent is 530 sqm net.

3.7 Most, if not all new foodstores are likely to contain an element of comparison goods floorspace. As this is a hypothetical exercise, we have made a broad assumption on the convenience / comparison goods split. For a store of the scale suggested under Scenario 1, we have assumed 90% convenience goods floorspace (2,509 sqm net). For a store of the scale suggested under Scenario 2, we would expect a greater proportion of floorspace will be used for the sale of comparison goods. Under this Scenario we have therefore assumed 80% of the floorspace would be dedicated to the sale of convenience goods (4,461 sqm net).

3.8 Given the more limited capacity that exists in the convenience sector and the pressure for convenience retail development, we have focussed our assessment on the impact of the convenience element of a new foodstore. If and when a planning application is submitted for a new foodstore in the Borough, the Council should carefully consider the impacts that are likely to be associated with the entire scheme in accordance with PPS4.

3.9 The Council has identified the following four sites which may offer potential to accommodate new foodstore development of the scale to be tested under Scenarios 1 and 2. The location of these sites is illustrated on Plan II and listed below:

Site A: Site fronting the High Street[3] (in-centre);

Site B: South Street Long Stay Car Park (edge-of-centre);

Site C: Coldharbour Industrial Area (edge-of-centre); and

Site D: Land to the South of Heritage Way (out-of-centre).

3.10 We have undertaken a quantitative impact assessment which identifies the likely impact of new convenience floorspace, under Scenarios 1 and 2, coming forwards on each of the above sites. This is relevant in respect of PPS4 Policy EC16.1.b and EC16.1.d. Our consideration of the remaining EC16 tests is dealt towards the end of this section.

[3] Although no specific site has been identified, the Study has tested a theoretical scenario should a site in the town centre become available.

Methodology

3.11 In order to carry out a quantitative impact assessment, we have adopted a conventional and widely accepted step by step methodology which draws on the results of the 2007 household survey used to underpin the Council's Retail Study. The survey area and location of existing foodstores is illustrated on Plan I. The survey evidence enables the modelling of existing flows of available expenditure to existing centres/stores and assessment of the impact of new floorspace on current shopping patterns. To summarise, the methodology used has:-

- Estimated the population for each zone in the survey area at 2011, 2016 and 2021 adopting Hampshire County Council's long-term forecasts (2009) (Table 1, Appendix II).
- Estimated the average convenience goods spend per person for each zone in the survey area at 2011, 2016 and 2021 using data derived from the Experian E-Market system and the most up-to-date economic advice published by Experian and Pitney Bowes (Table 2, Appendix II).
- Calculated the total amount of convenience goods expenditure which is generated within the survey area (Table 3, Appendix II).
- Allocated the proportion of expenditure drawn to the main centres/stores, based on the results of the household survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales (Tables 4 & 5, Appendix II);
- Assessed the changing shopping patterns likely to arise as a consequence of relevant commitments (Table 8, Appendix II);
- Estimated the turnover required to support a new foodstore under either Scenario 1 or 2 in the Borough and the likely pattern of trade draw to a store located on any one of the identified sites (Table 9, Appendix II); and
- In accordance with PPS4 and best practice we have assessed the likely cumulative effects of a new foodstore in the Borough and existing commitments (Tables 10-10A and 11-11A, Appendix II).

Turnover of new convenience floorspace

3.12 As we are testing hypothetical scenarios whereby there is no named foodstore operator we have assumed an average sales density of £13,200 per sqm at 2011. This is the average convenience sales densities of two of the 'Big 4' operators – Tesco and Sainsbury's - derived from Verdict's UK Food and Grocery Retailers 2010 report. We have not included Asda or Morrisons sales densities in this calculation given that these retailers are already represented in Gosport.

3.13 For the purpose of this assessment we have tested impacts at 2016. After taking into account anticipated growth in sales efficiency (0.2% per annum 2011-2016), we estimate the potential convenience goods turnover of a new foodstore could range from £33.5m (Scenario 1) to £59.5m (Scenario 2) at 2016 (Table 9, Appendix II).

Trade Draw & Impact on Town Centre Turnover

3.14 From the outset it is important to note that the trade diversion impacts associated with both Scenario 1 and Scenario 2 will be similar, since both scenarios propose a large quantum of new convenience floorspace (sufficient to influence local convenience shopping patterns).

3.15 As illustrated on Plan II, Sites A, B and C are situated in close proximity to one another, either located in or on the edge of Gosport town centre. We have therefore assumed that a new foodstore on any one of these sites will draw from a similar catchment and impact on the same stores/centres under each Scenario. We would expect a new foodstore at any one of these sites will draw 55% of its convenience goods trade from Zone 1, 25% from Zone 2, and 10% each from Zone 3 and 4. This catchment reflects the geographic characteristics of the area which is bordered by the south coast and the more localised nature of convenience goods shopping.

3.16 Site D is located within the southern part of Zone 4. The site is situated just off the A32 which is one of the main arterial roads between Gosport and Fareham. Given its location, we have assumed that a foodstore on this site will serve a different catchment to that anticipated at Sites A-C. We expect a foodstore in this location will draw 40% of its convenience goods trade from each of Zones 1 and 4, 15% from Zone 3 and 5% from Zone 2. Again, we have assumed the same trade draw under both Scenarios 1 and 2 for the reasons stated previously.

3.17 The model then adjusts market shares for each centre/foodstore both in and outside the Borough to demonstrate the decline in its trade draw as a consequence of new foodstore of development on Sites A-D. Tables 10 and 10A, Appendix II summarise the solus impact of new foodstore development of Sites A-D. However, it is important to recognise that this impact is over and above existing commitments and therefore the cumulative impact figures presented in Tables 11 and 11A, Appendix II are more pertinent and it is these figures which are discussed in more detail below.

3.18 Under **Scenario 1** (2,509 sqm net) we estimate that a new foodstore on **Sites A-C** at 2016 will lead to an impact of 49.3% on the Morrisons in Gosport; a 41.2% impact on the Waitrose in Gosport; a 41.6% impact on the Asda in Gosport and 35.8% impact on the Asda store in Fareham. We anticipate a positive impact of 13.1% impact on the Lidl, Forton Road (attributable to the store's extension[4]), but a negative impact of 11.2% impact on the new Tesco store in Rowner.

3.19 We anticipate a cumulative impact of 3.9% on 'Other' stores in the Borough which include smaller convenience goods facilities such as those located in local and neighbourhood centres. We do not anticipate any impact of a new foodstore development at Sites A-C on existing stores in Lee-on-the-Solent or Portsmouth.

3.20 We anticipate a new foodstore of the same scale at **Site D** would lead to a cumulative impact of 38.6% on the Morrisons in Gosport; a 20.0% impact on the Waitrose in Gosport; a 34.0% impact on the Asda in Gosport and 38.7% impact on the Asda store in Fareham. Evidently, the focus of impact of a store located at Site D has shifted (e.g. to Asda, Fareham), compared to the focus of impact of a store located on any one of Sites A-C which predominantly affects stores located in the south of the Borough (e.g. Morrisons, Waitrose and Asda).

3.21 Notwithstanding this, irrespective of location, the level of impact identified on existing foodstores is, in our view, remarkably high. For example, in respect of the town centre stores, the level of anticipated trade diversion from the Morrisons in Gosport would leave the Morrisons store with an estimated turnover of between £10.1m - £12.3m which is

[4] Without the scenarios, there would be a positive impact of 30.6% attributable to the store's extension.

significantly below our estimate based on company average (£27m). Similarly, we estimate that the turnover of the Waitrose in Stoke Road fall to between £4.9m - £6.7m which is again well below our estimate based on company average (£10.4m). The significance of this level of impact on the overall vitality and viability of theses centres is discussed in more detail below.

3.22 Clearly, the larger scale of store suggested under **Scenario 2** will only lead to a greater level of trade draw and impact on existing foodstore provision to that identified under Scenario 1. This is demonstrated in Table 3.1 below.

3.1 Cumulative Impact Summary

Store	Commitments (% impact)	Scenario 1		Scenario 2	
		Sites A-C (% impact)	Site D (% impact)	Sites A-C (% impact)	Site D (% impact)
Morrisons, Gosport	**-12.9%**	**-49.3%**	**-38.6%**	**-77.6%**	**-58.7%**
Waitrose, Gosport	**-7.3%**	**-41.2%**	**-20.0%**	**-67.5%**	**-29.9%**
Lidl, Forton Road	30.6%	13.1%	18.7%	-0.5%	9.5%
Tesco, Rowner	-	-11.2%	-12.4%	-19.8%	-22.0%
Asda, Gosport	-15.4%	-41.6%	-34.0%	-61.9%	-48.4%
Asda, Fareham	-20.7%	-35.8%	-38.7%	-47.6%	-52.8%
Tesco, Fareham	-	-4.5%	-16.4%	-8.0%	-29.2%
Sainsbury's, Fareham	-19.2%	-19.3%	-19.8%	-19.3%	20.2%

Source: GVA, 2011

3.23 These impact figures reflect the lack of capacity to support additional convenience goods in the Borough and only modest scope to increase market share in the Borough's zones (Zones 1-4), as discussed in Section 2. Furthermore, after taking into account existing commitments for additional convenience floorspace (e.g. Tesco, Rowner), which will rely on claw back from existing stores both within and beyond the Borough boundary; there is reduced scope for further claw back to support additional convenience floorspace in the Borough over and above existing commitments.

3.24 Based on our analysis, we consider it inevitable that any new convenience goods provision in the Borough will need to rely largely on the diversion of trade from existing stores in the Borough and, as demonstrated above, it is these stores which will experience most impact. The extent to which the identified levels of trade draw will result in an adverse impact on town centre vitality and viability is considered in more detail below.

Impact on town centre Vitality and Viability

Gosport town centre

3.25 As highlighted in Section 2, Gosport town centre is currently considered to be a healthy town centre. The Morrisons is the main foodstore in the town centre and is regarded as a key attractor. As demonstrated above, the trade draw implications of a new large format store (e.g. Scenario 1) coming forwards in the Borough will be such that the Morrisons store is likely to trade significantly below its company average.

3.26 We can only speculate about how this will affect the retailer's operation and continued investment in the store and the subsequent implications this will have on the town centre. Furthermore, whether the impact identified on the Morrisons will lead to a significant, adverse effect on the vitality and viability of the town centre will also vary depending on the location of a new foodstore development.

3.27 For example, a new foodstore located at **Site A**, would be well integrated and capable of functioning as part of the town centre. The new store would therefore contribute to the retail offer and overall turnover of the town centre and offset impact as the anticipated turnover drawn from the Morrisions will essentially remain in the town centre. This does not however, take into consideration any negative effects of the potential decline of the Morrisons store as a result of this trade diversion.

3.28 As highlighted above, there is no certainty over how Morrisons would respond to new competition in the town centre. We consider it unlikely that they would choose to close the store. However, they could reduce investment which could, in turn, affect the vitality and viability of the town centre. Alternatively, In the face of direct competition, Morrisons could choose to increase their investment in the store which would only be beneficial to the town centre. It is not possible at this stage to predict which outcome is more likely.

3.29 **Site B** is an edge-of-centre site situated to the south of South Street. The site is currently used as a car park and linked trips between the site and the town centre do presently occur. A foodstore on this site would not be as well-integrated with the town centre as one located on Site A. However there would still be a reasonable propensity for linked trips which could be encouraged through appropriate design and management. Such trips would positively benefit the town centre and contribute towards offsetting negative impacts. Although the over-riding positive benefits are likely to be less than those that would occur with development on Site A.

3.30 **Site C** is also located edge-of-centre, to the north-east of High Street and north of Mumby Road (A32). The site, which borders the harbour, is extensive (5.6ha) and recognised in the Council's emerging Core Strategy for its potential to accommodate an extension to the town centre (Strategic Area 1).

3.31 Taking into account the aspirations for Site C, if a foodstore were to be developed as part of a mixed-use scheme and existing linkages to the town centre were improved, we would expect some linked-trips to occur. However, depending on the scale and form of development it is possible that new development at the waterfront could result in an overall shift in focus of the town centre eastwards to the potential detriment of the western end of High Street.

3.32 This would be a concern in any event of any form of retail development on the waterfront and only reinforces the vital role played by the Morrison as an important anchor at the western end of High Street. The level of impact on this store, assuming a new foodstore is located at the waterfront, is likely to be significant in terms of the adverse impacts its decline will have it will require a balanced judgement to consider whether the convenience retail impacts may be offset by the positive benefits of delivering development on this site.

3.33 Finally, **Site D** is located out-of-centre and whilst a store in this location is likely to draw marginally less trade from the Morrisons store; its location offers no positive benefit to potentially offset any negative impact on Gosport town centre. This site is therefore the least preferential location for a new foodstore development. In our view, based on the identified level of trade draw from the Morrisons, a foodstore on this site can only be detrimental to the vitality and viability of the town centre.

Stoke Road district centre

3.34 Our health check assessment of Stoke Road indicates that the centre is currently performing in line with its role as a district centre although it is showing some signs of vulnerability, particularly in relation to the high number of vacant units. The centre is anchored by Waitrose which, like the Morrisons in Gosport, is considered to be a key attractor to the centre. The 2007 Retail Study recognised the important role served by the Waitrose as an anchor store and recommended its protection through any strategy for the centre/Borough.

3.35 Our trade draw analysis demonstrates that a new large format store on any one of **Sites A-D**, will divert a significant level of trade from the Waitrose store in Stoke Road. Unlike the potential for such a development to offset impact in Gosport town centre, there will be no such benefits in Stoke Road. The anticipated diversion of trade from Stoke Road to a new foodstore will affect the propensity for linked trips occurring between the Waitrose and the rest of the centre. This will consequently affect the vitality and viability of the centre which is already showing signs of vulnerability.

Impact on existing, committed, planned public and private investment

3.36 The impact analysis above takes into account the trade draw implications of a new foodstore development on existing commitments in the Borough which include a small-scale extension to the Lidl on Forton Road and the new Tesco in Rowner which is due to be constructed in 2012. It is likely that a new foodstore will draw an element of its trade from both of these stores, although given similarities in the type of offer, the Tesco in Rowner is likely to more greatly affected. We also anticipate that the likely pattern of trade draw to the extended Lidl is likely to offset any negative impact on this particular store.

3.37 We anticipate that a foodstore of the scale suggested under Scenario 1 is likely to result in an impact of between 11.2% and 12.4% depending on the location of new foodstore development (i.e. Sites A-C or Site D). The level of anticipated trade diversion from the new Tesco in Rowner would leave the store with an estimated turnover of between £17.7m - £18m which is between 12-14% below company average (£20.3m). This could be potentially significant as the store is an important element of the planned regeneration of Rowner. Under Scenario 2, the impact on this store will only be higher and therefore more significant.

3.38 In respect of planned investment, the Council has clear aspirations to create a new waterfront location, not dissimilar to Gun Wharf Quays in Portsmouth, which would be accommodated on land at Site C. The redevelopment of this site therefore has the potential to significantly contribute to the vitality and viability and attractiveness of Gosport through a high quality mixed use development, which could also comprise complementary eating and drinking facilities.

3.39 A foodstore may form the enabling development to bring forward the redevelopment of the site in accordance with emerging policy objectives for the area. However, such development will also impact on the Morrisions store which could subsequently lead to the decline of the western end of High Street, as the retail focus shifts eastwards and Morrisons role as an anchor store is diminished. Given these concerns, the Council will need to reach a balanced judgement over whether a foodstore is necessary to underpin the delivery of the site and whether the benefits of delivering the Councils aspirations for the site will be such that they will offset impacts experienced elsewhere in the centre.

Summary

3.40 Consistent with the 2007 Retail Study, our up-dated analysis indentifies no quantitative need for the Council to plan for additional large format foodstore provision in the Borough over the plan period. Our impact assessment demonstrates that a new foodstore in the Borough (under either Scenario 1 or 2) will lead to significant trade diversion from existing stores, particularly those situated in and around Gosport town centre and Stoke Road district centre.

3.41 It is evident that impact on Gosport town centre could potentially be offset if the new foodstore were developed on Site A which would be well integrated and able to function as part of the town centre. However a store in this location is still likely to adversely impact on Stoke Road district centre.

3.42 There is potential that a foodstore located on Site B could support linked trips with the town centre. However this is unlikely to be sufficient to offset identified impacts. In any event a new store in this location is also likely to lead to an adverse impact on Stoke Road district centre.

3.43 We have not, as part of this study, undertaken any detailed viability analysis. However, given the scale and locational constraints associated with Site A and B, we consider that these sites would likely only be able to accommodate a small-medium sized foodstore and not one of the scale tested under Scenario 1 (2,788 sqm net). The impact associated with a smaller store in these locations would therefore be less than identifeid.

3.44 In our view Site C is less sequentially preferable than Site A (most sequentially preferable), or Site B. The Council will need to take a balanced judgement on the merits of a new foodstore in this location, which is likely to lead to an adverse impact on the western part of the centre, in the context of delivering local policy aspirations for the site.

3.45 Site D is located out-of-centre and will offer no positive benefit to potentially offset the high levels of trade draw from stores in existing centres in the Borough. A foodstore in this location can therefore only be detrimental to the vitality and viability of existing centres and should be resisted on this basis. In sequential terms, this site is the least sequentially preferable.

ii) Convenience Retail Floorspace at the Royal Hospital Haslar

3.46 The Council's Core Strategy Preferred Options (September 2009) identifies the Haslar Peninsula as a significant area of change and focus for development under suggested Policy CS3: Spatial Strategy. The area consists of three large areas, including the Royal Hospital Haslar, which closed as a military hospital in 2007.

3.47 Under Strategic Area 3, the Council sets out the high level options for the site. Due to the large amount of floorspace at the site, it is envisaged that there will be a range of uses that could be accommodated, such as:

- Health and medical;
- Care facilities;
- Employment uses;
- Local centre/community uses;
- Leisure/cultural facilities; and
- Residential.

3.48 At present there is no indicative Masterplan for the area although it is likely that the majority of new housing on the site will be orientated towards an older age profile or those requiring care. Given that there is no current provision of local retail facilities in the area (consistent with its current use); we would anticipate a need arising for new facilities to meet the local needs of new residents. Such provision should however only come forward as supporting floorspace and should be localised in nature serving the immediate residential/employment catchment for everyday and small-scale shopping requirements.

3.49 To provide an indication on what is likely to be an appropriate, if for example approximately 500 units of predominantly elderly units were to come forward[5], this could theoretically support a population of approximately 700 people[6]. Our updated analysis indicates that the average annual convenience spend per person in Zone 2 (the site's location zone) is currently £1,934. Theoretically, therefore the new population could generate in the region of £1.4m per annum, not allowing for any growth in expenditure or deductions for Special Forms of Trading (SFT).

3.50 This level of expenditure could therefore theoretically support between 190 sqm convenience floorspace (based on a sales density of £10,000 per sqm which is typical of typical of the main foodstore retailers operating small format stores) and 379 sqm net convenience floorspace based on a lower sales density of £5,000 per sqm. Clearly the amount of floorspace supportable will be sensitive to the type of format and retail operator.

3.51 On the basis of the above, we would not anticipate that new small-scale retail provision in this location, as part of the wider residential and mixed-use redevelopment of the site, would draw significant trade from existing centres in the Borough. However, this has not been assessed in detail and therefore any proposals for retail floorspace in this location should be tested against the relevant national and local policies to ensure there is no threat to the vitality and viability of exiting centres.

iii) Convenience Retail floorspace at Daedalus

3.52 Daedalus is a former naval base located to the north-west of the built-up area of Lee-on-the-Solent. The site comprises approximately 189 ha, although only the southern portion, referred to as 'Waterfront', falls within the administrative area of Gosport Borough. The Waterfront is currently the subject of an outline planning application (ref: 17976) seeking permission for:

[5] This is an entirely theoretical assumption. At present there is no commitment to any form of development on this site.

[6] Assuming an average of 1.4 persons per household over 75 (ONS)

"Employment-led mixed use scheme including up to 69,992 sq m of commercial floorspace in new buildings and re-use of existing buildings (Use Classes B1, B2 and B8), up to 1,075 sqm of retail (Use Classes A1, A2, A3 and/or A4); up to 200 residential units (Use Class C3), up to 32 units of sheltered accommodation (Use Class C2); up to 1,839 sqm of community uses (Use Class D1); up to 8,320 sqm of hotel use (Use Class C1); up to 2,321 sqm of leisure (Use Class D2); new and upgraded vehicular and pedestrian access arrangements; hard standing and car parking; open space provision; landscaping; and associated works".

3.53 It is envisaged that the retail facilities will include a small foodstore and other small scale shops such as dry cleaners, café, newsagents and a pub/restaurant which will serve the immediate business and residential community, which the applicant states will complement the existing facilities in Lee-on-the-Solent which is located nearby. On this basis, and given policy support for the development, the applicant has not considered it necessary to prepare a retail assessment. The Council therefore has no evidence upon which to judge the appropriateness of the scale and form of retail development proposed.

3.54 The purpose of this assessment is to consider the impact implications of additional convenience goods floorspace coming forward on the site and to provide the Council with an indication as to what quantum of convenience goods floorspace may be acceptable and appropriate to support the new communities at the site. We have focussed our assessment on convenience retail given the more limited capacity that exists in the convenience sector and the tendency for smaller centres to rely more heavily on convenience shopping trade.

Existing Provision

3.55 The main centre currently serving this part of the Borough is Lee-on-the-Solent district centre. As highlighted previously the centre's convenience offer includes a small Co-op convenience store (c.530 sqm net) which is complemented by several independent convenience operators. The centre also offers a wider mix of shops and services so that it is not considered unduly reliant on its convenience shopping function. The centre is considered to be in good health with few vacancies.

3.56 Other existing provision in the area includes a small Co-op on Twyford Drive which is likely contributing towards serving the day-to-day needs of local residents living in the eastern parts of the built up area.

3.57 In addition to these two existing stores, we are aware that planning consent has been granted for an additional 333 sqm gross (250 sqm net[7]) A1 retail floorspace at Pier House, Marine Parade East, Lee-on-the-Solent, which we understand is soon to be occupied as a Tesco Express. In order for us to understand the implications of additional convenience goods development at Daedalus, it is first necessary to consider the effects of the new Tesco Express on local shopping patterns.

3.58 Based on a company average sales density of £13,510 per sqm and allowing for increased sales efficiency (0.2% pa) we estimate that this store will achieve a turnover in the region of £3.4m at 2016. Based on our understanding of current shopping patterns in this part of the Borough, we anticipate that the new Tesco Express will serve a limited, local catchment. It is possible that the store will draw some trade from beyond this area (e.g. tourist spend), however for the purposes of this exercise we have assumed 100% of its estimated turnover will be derived from within Zone 3. The trade draw implications of the Tesco are demonstrated in Table 3.2 below.

3.2 Impact of Tesco (solus)

Store	Turnover 2016 (£m)	Trade Draw to Tesco, Lee (£m)	Turnover 2016 After Tesco (£m)	% Impact
Co-op, Lee-on-the-Solent	£3.8	-£0.9	£2.9	-23.6%
Other	£249.9	-£0.3	£249.6	-0.1%
Clawback to Zone 3[8]	-	-£2.2	-	-
Tesco, Lee-on-the-Solent	-	+£3.4	£3.4	-

[7] Assuming a net:gross ratio of 75:25%.

[8] Includes expenditure currently leaking from Zone 3 to other stores in the Borough and beyond which has reasonable scope of being clawed back.

Implications of the scheme

3.59 We have tested the quantitative implications of three varying scale of convenience store development:

- 800 sqm net;
- 500 sqm net; and
- 200 sqm net.

3.60 To set the context for the size of store set out above, the Co-Op in Lee-on-the-Solent is 530 sqm net; the Co-op, Rowner Road is 315 sqm net; the Co-op, Gregson Avenue is 278 sqm net; and both the Co-op, Forton Road and the Tesco Express, Carless Close are 159 sqm net.

3.61 The first stage of our analysis tests the worst case (800 sqm net) which assumes that 100% of the proposed retail floorspace (1,075 sqm gross[9]) is delivered in the form of a convenience store. We estimate that a foodstore of this scale has potential to turnover c.£8.1m in 2016, based on an estimated sales density of £10,000 per sqm.

3.62 Taking into account the wider proposals for the Daedalus site and the significant level of planned new employment floorspace, we can assume that a proportion of the store's turnover will be supported by inflow from beyond the immediate catchment (e.g. Zone 3) and potentially from beyond the survey area. For the purposes of this assessment, we have assumed an inflow of 30%. We have therefore assessed the implications of a new convenience store on the basis that it will draw 70% of its estimated turnover from within Zone 3. For a store comprising 800 sqm net, this equates to approximately £5.7m and 17.2% of total expenditure generated in Zone 3.

3.63 Based on the largest convenience store scenario and taking into account the likely trade draw patterns of the new Tesco Express in Lee-on-the-Solent, we estimate that this scale of development will lead to a solus impact of 89.8% on the existing Co-op in Lee-on-the-Solent and a 76.9% impact on the new Tesco Express. We consider this scale of

[9] Netted down at 75% and rounded.

convenience store would lead to significant trade diversion from existing and planned stores in Lee-on-the-Solent which will be detrimental to the vitality and viability of the district centre.

3.64 Incorporating a proportionate reduction in monetary impact based on the lower turnover of the smaller stores we have reviewed the cumulative impact implications of a store comprising 500 sqm net and 200 sqm net. Table 3.3 below summarises the impact identified under each scenario:

3.3 Impact Summary

Store	% Impact 800 sqm net	% Impact 500 sqm net	% Impact 200 sqm net
Co-op, Lee-on-the-Solent	-89.8%	-56.2%	-22.5%
Tesco, Lee-on-the-Solent	-76.9%	-48.1%	-19.2%
Other	-0.2%	-0.1%	0.0%

Source: Table 3, Appendix III

3.65 It should be acknowledged that the impact figures, at this level, are very sensitive to the size of store and turnover per sqm and it is therefore very difficult to predict likely impact without greater certainty over the scale and form of development likely to be delivered. On this basis, the impact figures could be higher than those identified above or they could be lower. The Council should therefore allow for a margin of error.

3.66 Clearly, even a store comprising 200 sqm net will have some impact on the existing Co-op and new Tesco in Lee-on-the-Solent. Under this scenario, we estimate that the Co-op will have a turnover in the region of £2.3m, which would equate to a sales density of £5,340 per sqm. This is below the company's average benchmark of £9,688 per sqm but does not necessarily mean that the store will close.

3.67 Similarly, we estimate that the new Tesco Express will achieve a sales density of £11,022 per sqm, post development of a 200 sqm net store at Daedalus. Again, whilst this is below the retailer's company average (£13,510 per sqm), it is still a reasonable performance for a small express store.

Summary

3.68 Given the significance of likely impact identified under the worst case scenario (i.e.100% convenience floorspace) we would advise the Council to impose a condition which restricts the amount of A1 (food) floorspace that can be developed at the site. Whilst there is a margin of error over the above figures, we would consider 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.

4. Conclusions

4.1 Our updated review of convenience goods shopping in the Borough reinforces the findings of our previous study and highlights no need for the Council to plan for any additional large scale convenience goods provision in the Borough over the forthcoming plan period.

4.2 Our analysis indicates that additional large-scale foodstore development in the Borough, over and above existing commitments, is likely to lead to significant trade diversion from existing stores, both within Gosport and beyond the Borough boundary (e.g. Fareham). However the detrimental effects of such diversion on the vitality and viability will vary depending on the location of new foodstore development. We also recognise that there may be other qualitative factors which should be taken into consideration.

4.3 Having reviewed four potential sites identified by the Council (Sites A-D) we conclude that in PPS4 terms, Site A would be the most sequentially preferable location for a new foodstore development subject to it being available and viable. A store in this location would be well-integrated and capable of functioning as part of the town centre. We would expect a store in this location to offset impact on the town centre.

4.4 Following this we conclude that Site B would be the next sequentially preferable location on the basis that a foodstore in this edge-of-centre location could support linked-trips with the town centre, particularly as these links with the existing use (car park) are already established and occurring. We also anticipate that there may be constraints on the scale of store capable of being accommodated on this site and therefore the impacts associated with this will be less than identified by our assessment.

4.5 We consider Site C is the next sequentially preferable site after Sites A and B. The site, at present, is less well integrated with the town centre. However the Council's aspirations for the redevelopment of the area to form an extension to the town centre should be taken into consideration, particularly if a foodstore forms the enabling development for a wider scheme. A foodstore in this location is likely to diminish the anchor role performed by the Morrisons which in turn is likely to lead to an adverse impact on the western part of the town centre. The Council will therefore need to take a balanced view as to the merits of delivering the policy aspirations for this site and the degree to which this is likely to offset impact elsewhere the town centre.

4.6 Site D is located out-of-centre and will offer no positive benefit to potentially offset the high levels of trade draw from stores in existing centres in the Borough. A foodstore in this location can therefore only be detrimental to the vitality and viability of existing centres and should be resisted on this basis. In sequential terms, this site is the least sequentially preferable.

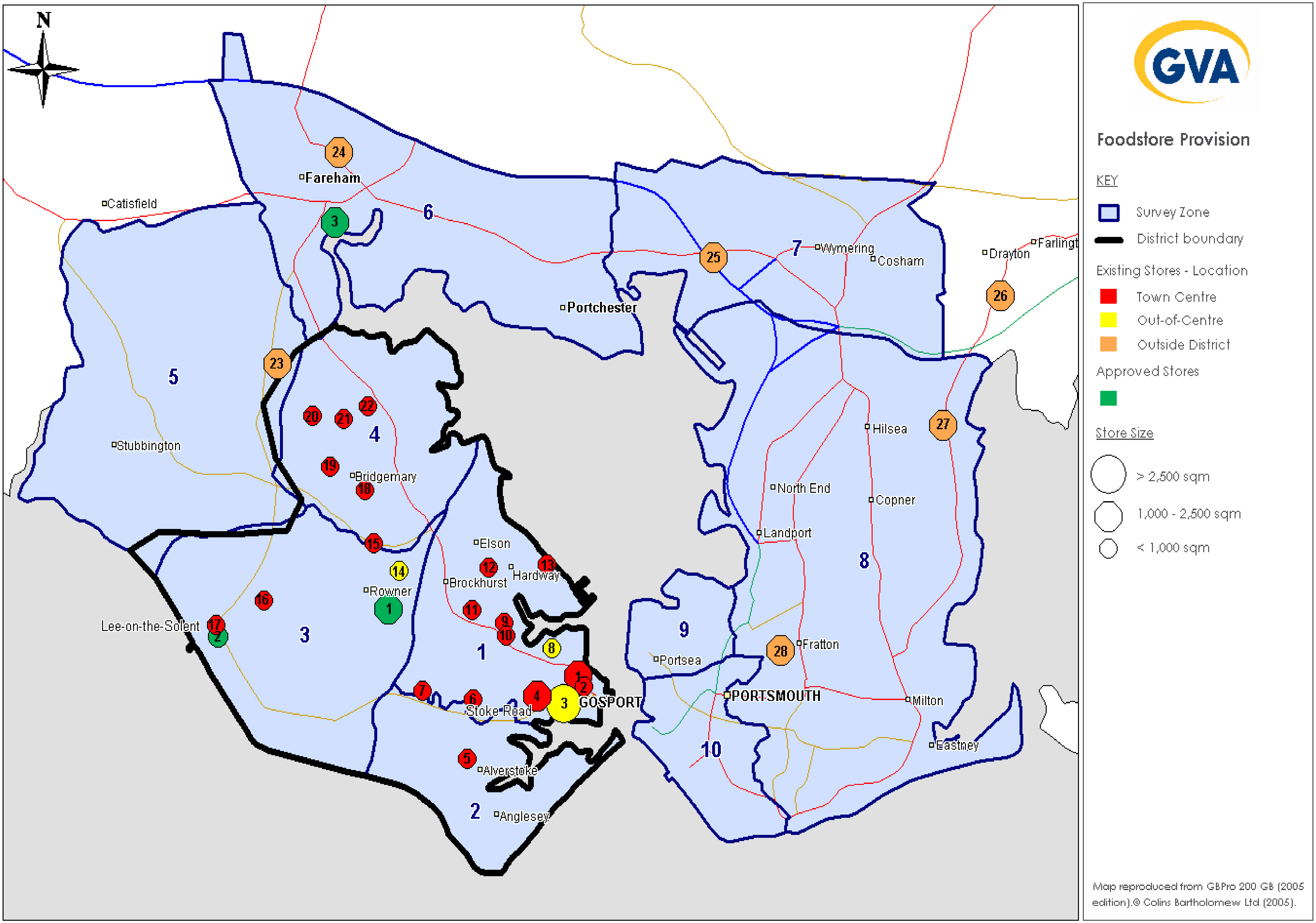
4.7 It is also recognised that the Council may need to take into account qualitative considerations for additional convenience goods provision in other strategic areas (e.g. Haslar Peninsula and Daedalus) in the Borough to ensure that arising needs are adequately met in the most sustainable manner.

4.8 Whilst there is no indicative masterplan for the Haslar Peninsula we would anticipate a need arising for new facilities to meet the local needs of new residents in this area. Such provision should however only come forward as supporting floorspace and should be localised in nature serving the immediate residential/employment catchment for everyday and small-scale shopping requirements.

4.9 We have reviewed the proposals for new retail floorspace at the Daedalus site and given the significance of likely impacts identified on Lee-on-the-Solent, we would advise the Council to impose a condition which restricts the amount of A1 (food) floorspace that can be developed at the site. Based on our assessment, we conclude 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.

Plans

Plan I
Survey area and main foodstores



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Foodstore Provision

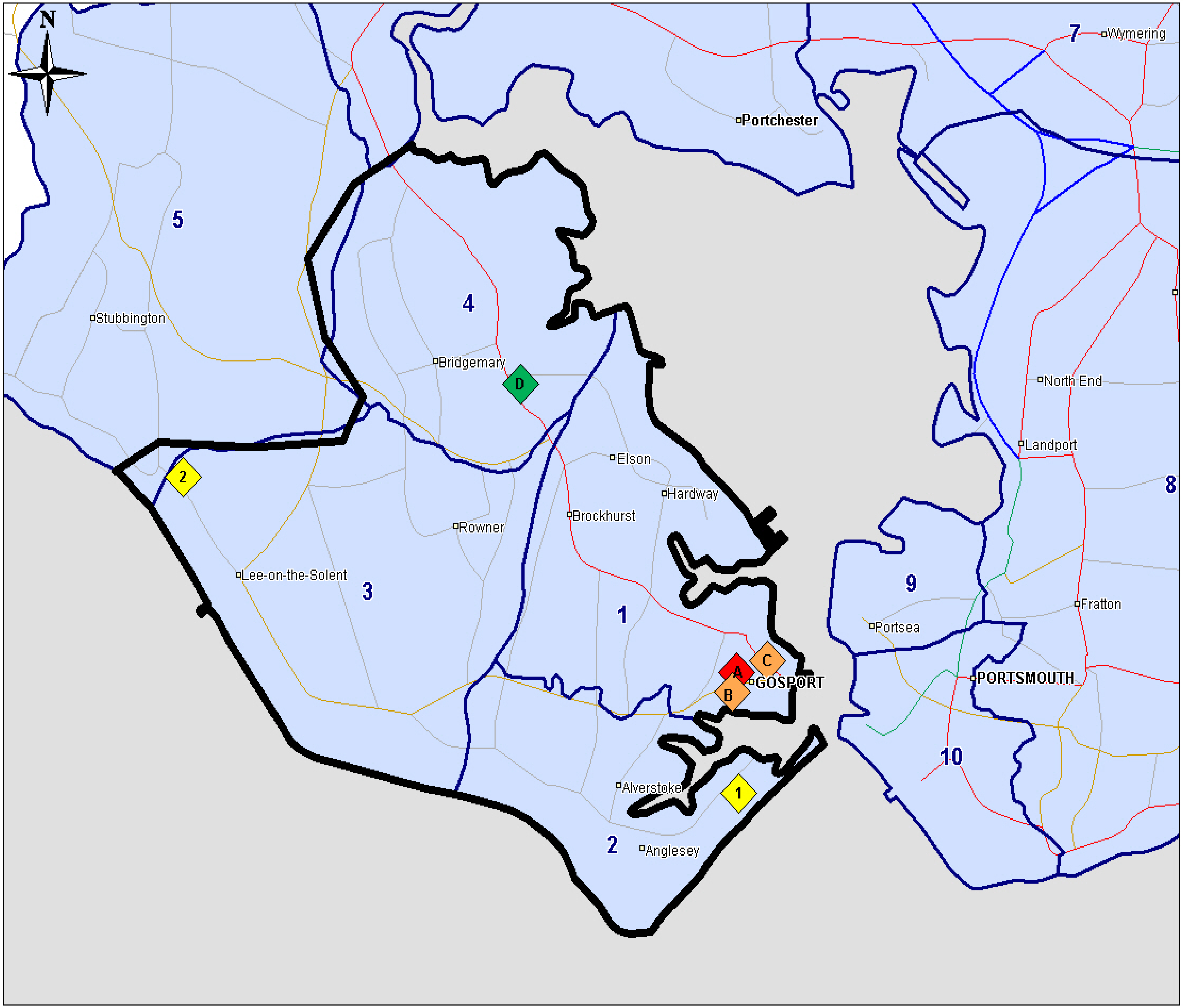
Existing Stores

1 Morrisons, Walpole Road
2 Iceland, Walpole Road
3 Asda, Dock Road
4 Waitrose, Stoke Road
5 One-Stop, Alverstoke Village
6 Co-op, Bury Cross
7 Co-op, Queens Parade, Privett Road
8 Co-op, Forton Road
9 Lidl, Forton Road
10 Co-op, Forton Road
11 Co-op, Forton Road
12 Co-op, Palmyra Road
13 Co-op, Dartmouth Court, Priddy's Hard
14 Tesco Express, Carless Close
15 Co-op, Rowner Road
16 Co-op, Twyford Drive, Lee-on-the-Solent
17 Co-op, High Street, Lee-on-the-Solent
18 Co-op Community Store, Beauchamp Avenue
19 Co-op, Carisbrooke Road
20 Co-op, Tukes Avenue
21 Kev Jones Convenience Store, Nobes Avenue
22 Co-op, Gregson Avenue
23 Asda, Fareham
24 Sainsbury's, Fareham
25 Tesco Extra, North Harbour
26 Sainsbury's, Farlington
27 Morrisons, Portsmouth
28 Asda, Fratton, Portsmouth

Approved Stores

1 Tesco, Rowner (In Centre)
2 Tesco, Lee-on-the-Solent (In Centre)
3 Tesco, Fareham

Plan II
Potential foodstore development sites



GVA

Potential Foodstore Development Sites

KEY

Survey Zone

District boundary

Potential Development Sites

In Centre

A Site fronting the High Street

Edge-of-Centre

B South Street Long Stay Car Park

C Coldharbour Industrial Area

Out-of-Centre

D Land to the south of Heritage Way

Other Locations

1 Haslar Peninsula

2 Daedalus

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Appendices

Appendix I Quantitative Capacity Tables

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 1
Survey Area Population Forecasts

Catchment Zone	Postcode Sector Groupings	2011	2016	2021	2026	2028
1	PO12 1/3/4	36,425	35,951	35,521	35,271	35,245
2	PO12 2	10,064	9,933	9,814	9,745	9,738
3	PO13 8/9	18,710	18,466	18,245	18,117	18,104
4	PO13 0	15,111	14,914	14,735	14,632	14,621
5	PO14 1/2/3	25,079	25,530	26,070	26,746	27,061
6	PO16 0/7/8/9	32,177	32,609	33,437	34,211	34,512
7	PO6 1/2/3/4	38,974	39,222	39,878	40,692	41,017
8	PO1 1/4/5, PO2 0/7/8/9, PO3 5/6, PO4 0/8/9, PO5 1/2/4	139,880	140,771	143,124	146,047	147,215
9	PO1 3	7,610	7,658	7,786	7,945	8,009
10	PO12, PO5 3	11,962	12,038	12,239	12,489	12,589
TOTAL		**335,992**	**337,092**	**340,849**	**345,894**	**348,110**

Source: Experian Micromarketer, July 2011 & Gosport Borough Council 2011

Notes:

(1) Zone 1-4 Best Fit Boundary with Gosport Borough Council / Zone 7-10 Best Fit Boundary with Portsmouth City Council

(2) Population Growth / Fall in line with RSS population projections

Table 1A
Population Growth Rates

2011-2016 (%)	2016-2021 (%)	2021-2026 (%)	2026-2028 (%)	2011-2028 (%)
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
1.8	2.1	2.6	1.2	7.9
1.3	2.5	2.3	0.9	7.3
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.3	**1.1**	**1.5**	**0.6**	**3.6**

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 2
Survey Area Retail Expenditure Forecasts Per Capita (2009 prices) - Convenience Goods

Growth in convenience goods per capita retail expenditure:

2009 - 2010 0.3% pa
2010 - 2011 0.0% pa
2011 - 2016 0.6% pa
2016 - 2028 0.7% pa

ZONE	2009	2009 Minus SFT at 3.5%	2011	2011 Minus SFT at 4.0%	2016	2015 Minus SFT at 5.0%	2021	2021 Minus SFT at 5.2%	2026	2026 Minus SFT at 5.5%	2028	2028 Minus SFT at 5.5%
1	1,790	1,727	1,795	1,724	1,850	1,757	1,916	1,816	1,984	1,874	2,011	1,901
2	1,934	1,866	1,940	1,862	1,999	1,899	2,070	1,962	2,143	2,025	2,173	2,054
3	1,809	1,746	1,814	1,742	1,870	1,776	1,936	1,835	2,005	1,894	2,033	1,921
4	1,802	1,739	1,807	1,735	1,862	1,769	1,928	1,828	1,997	1,887	2,025	1,914
5	1,862	1,797	1,868	1,793	1,924	1,828	1,993	1,889	2,063	1,950	2,092	1,977
6	1,937	1,869	1,943	1,865	2,002	1,902	2,073	1,965	2,146	2,028	2,177	2,057
7	1,810	1,747	1,815	1,743	1,871	1,777	1,937	1,836	2,006	1,895	2,034	1,922
8	1,795	1,732	1,800	1,728	1,855	1,762	1,921	1,821	1,989	1,880	2,017	1,906
9	1,294	1,249	1,298	1,246	1,337	1,270	1,385	1,313	1,434	1,355	1,454	1,374
10	1,697	1,638	1,702	1,634	1,754	1,666	1,816	1,722	1,880	1,777	1,907	1,802

Source: Experian E-Marketer, July 2011

Table 3
Survey Area Retail Expenditure Forecasts (2009 prices)

Zone	Convenience Goods				
	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)
1	62,781	63,180	64,503	66,113	66,992
2	18,741	18,860	19,255	19,736	19,998
3	32,590	32,797	33,484	34,319	34,776
4	26,219	26,385	26,938	27,610	27,978
5	44,964	46,671	49,246	52,150	53,506
6	60,013	62,013	65,706	69,393	70,987
7	67,924	69,698	73,224	77,126	78,836
8	241,765	248,080	260,629	274,520	280,604
9	9,481	9,729	10,221	10,766	11,004
10	19,545	20,056	21,070	22,193	22,685
Total	**584,024**	**597,469**	**624,276**	**653,926**	**667,365**

Source: Table 1 & 2

GOSPORT BOROUGH COUNCIL

Gosport Retail Study Update 2011

Gosport Town Centre

Table 4

Convenience Goods Allocation - % Market Share

Catchment Zone	MORRISONS, WALPOLE ROAD					ICELAND, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	18	18	18	18	18	1	1	1	1	1	2	2	2	2	2	21	21	21	21	21
2	19	19	19	19	19	0	0	0	0	0	3	3	3	3	3	22	22	22	22	22
3	8	8	8	8	8	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8
4	9	9	9	9	9	0	0	0	0	0	3	3	3	3	3	12	12	12	12	12
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: Gosport Telephone Survey, January 2007

Table 5

Convenience Goods Allocation - Spend (£) 2009 Prices

Catchment Zone	MORRISONS, WALPOLE ROAD					ICELAND, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	11,288	11,360	11,598	11,887	12,045	527	531	542	555	563	1,149	1,156	1,180	1,210	1,226	12,964	13,047	13,320	13,652	13,834
2	3,570	3,593	3,668	3,760	3,810	0	0	0	0	0	570	573	585	600	608	4,140	4,166	4,253	4,360	4,418
3	2,633	2,650	2,705	2,773	2,810	0	0	0	0	0	0	0	0	0	0	2,633	2,650	2,705	2,773	2,810
4	2,373	2,388	2,438	2,499	2,532	0	0	0	0	0	891	897	916	939	951	3,264	3,285	3,354	3,437	3,483
5	0	0	0	0	0	0	0	0	0	0	148	154	163	172	177	148	154	163	172	177
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**19,864**	**19,990**	**20,409**	**20,918**	**21,197**	**527**	**531**	**542**	**555**	**563**	**2,758**	**2,781**	**2,844**	**2,921**	**2,962**	**23,150**	**23,302**	**23,795**	**24,394**	**24,721**

Source: Tables 3 & 4

GOSPORT BOROUGH COUNCIL

Gosport Retail Study Update 2011

Gosport Out Of Centre

Table 6

Convenience Goods Allocation - % Market Share

Catchment Zone	ASDA, DOCK ROAD 2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028	TESCO EXPRESS, CARLESS CLOSE 2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028	TOTAL 2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028
1	40	40	40	40	40	1	1	1	1	1	41	41	41	41	41
2	37	37	37	37	37	0	0	0	0	0	37	37	37	37	37
3	21	21	21	21	21	3	3	3	3	3	24	24	24	24	24
4	10	10	10	10	10	0	0	0	0	0	10	10	10	10	10
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1

Source: Gosport Telephone Survey, January 2007

Table 7

Convenience Goods Allocation - Spend (£) 2009 Prices

Catchment Zone	ASDA, DOCK ROAD 2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	TESCO EXPRESS, CARLESS CLOSE 2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	TOTAL 2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)
1	25,200	25,360	25,891	26,538	26,891	527	531	542	555	563	25,728	6,990	7,136	7,314	7,411
2	6,946	6,990	7,136	7,314	7,411	0	0	0	0	0	6,946	7,878	8,043	8,244	8,353
3	6,893	6,937	7,082	7,259	7,355	935	941	961	985	998	7,828	2,668	2,723	2,791	2,829
4	2,572	2,588	2,643	2,709	2,745	79	79	81	83	84	2,651	481	507	537	551
5	463	481	507	537	551	0	0	0	0	0	463	434	460	486	497
6	420	434	460	486	497	0	0	0	0	0	420	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	225	236	249	254
10	0	0	0	0	0	219	225	236	249	254	219	44,566	45,539	46,713	47,349
TOTALS	**42,494**	**42,790**	**43,719**	**44,842**	**45,450**	**1,760**	**1,776**	**1,820**	**1,872**	**1,899**	**44,254**	**63,240**	**64,644**	**66,334**	**67,244**

Source: Tables 3 & 6

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Stoke Road Town Centre

Table 8
Convenience Goods Allocation - % Market Share

	WAITROSE, STOKE ROAD					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
Catchment Zone	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)
1	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
2	22	22	22	22	22	0	0	0	0	0	22	22	22	22	22
3	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
4	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: Gosport Telephone Survey, January 2007

Table 9
Convenience Goods Allocation - Spend (£) 2009 Prices

	WAITROSE, STOKE ROAD					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
Catchment Zone	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)
1	1,783	1,794	1,832	1,878	1,903	0	0	0	0	0	1,783	1,794	1,832	1,878	1,903
2	4,204	4,230	4,319	4,427	4,486	0	0	0	0	0	4,204	4,230	4,319	4,427	4,486
3	1,245	1,253	1,279	1,311	1,328	0	0	0	0	0	1,245	1,253	1,279	1,311	1,328
4	349	351	358	367	372	0	0	0	0	0	349	351	358	367	372
5	629	653	689	730	749	0	0	0	0	0	629	653	689	730	749
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**8,210**	**8,282**	**8,478**	**8,713**	**8,838**	**0**	**0**	**0**	**0**	**0**	**8,210**	**8,282**	**8,478**	**8,713**	**8,838**

Source: Tables 3 & 8

Lee-On-The-Solent Town Centre

Table 10
Convenience Goods Allocation - % Market Share

	CO-OP, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
Catchment Zone	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	11	11	11	11	11	1	1	1	1	1	12	12	12	12	12
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

Source: Gosport Telephone Survey, January 2007

Table 11
Convenience Goods Allocation - Spend (£) 2009 Prices

	CO-OP, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE					TOTAL				
Catchment Zone	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)
1	132	133	135	139	141	0	0	0	0	0	132	133	135	139	141
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	3,559	3,581	3,656	3,748	3,798	261	262	268	275	278	3,820	3,844	3,924	4,022	4,076
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	106	108	114	120	122	0	0	0	0	0	106	108	114	120	122
TOTALS	**3,796**	**3,822**	**3,906**	**4,006**	**4,061**	**261**	**262**	**268**	**275**	**278**	**4,057**	**4,085**	**4,174**	**4,281**	**4,339**

Source: ables 3 & 10

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Local Centres

Table 12
Convenience Goods Allocation - % Market Share

Catchment Zone	CO-OP & OTHER GREGSON AVENUE LOCAL CENTRE					CO-OP, ROWNER ROAD LOCAL CENTRE					LIDL, FORTON ROAD/CROSSWAYS LOCAL CENTRE					CO-OP, FORTON ROAD/CROSSWAYS LOCAL CENTRE				
	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)
1	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	4	4	4	4	4	3	3	3	3	3	0	0	0	0	0	1	1	1	1	1
5	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: Gosport Telephone Survey, January 2007

Table 12 cont…
Convenience Goods Allocation - % Market Share

Catchment Zone	ONE STOP & OTHER, ALVERSTOKE VILLAGE LOCAL CENTRE					BROCKHURST ROAD LOCAL CENTRE					TOTAL LOCAL CENTRES				
	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2028 (%)
1	0	0	0	0	0	1	1	1	1	1	6	6	6	6	6
2	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8
5	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: Gosport Telephone Survey, January 2007

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Local Centres

Table 13
Convenience Goods Allocation - Spend (£) 2009 Prices

Catchment Zone	CO-OP & OTHER GREGSON AVENUE LOCAL CENTRE					CO-OP, ROWNER ROAD LOCAL CENTRE					LIDL, FORTON ROAD/CROSSWAYS LOCAL CENTRE					CO-OP, FORTON ROAD/CROSSWAYS LOCAL CENTRE				
	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	132	133	135	139	141	264	265	271	278	281	1,563	1,573	1,606	1,646	1,668	1,413	1,422	1,451	1,488	1,507
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	88	89	90	93	94	0	0	0	0	0	0	0	0	0	0
4	1,093	1,100	1,123	1,151	1,167	700	704	719	737	747	0	0	0	0	0	157	158	162	166	168
5	0	0	0	0	0	463	481	507	537	551	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	224	230	242	255	260	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**1,225**	**1,233**	**1,259**	**1,290**	**1,307**	**1,515**	**1,539**	**1,588**	**1,645**	**1,673**	**1,787**	**1,803**	**1,848**	**1,901**	**1,928**	**1,570**	**1,580**	**1,613**	**1,653**	**1,675**

Source: Tables 3 & 12

Table 13 cont…
Convenience Goods Allocation - Spend (£) 2009 Prices

Catchment Zone	ONE STOP & OTHER, ALVERSTOKE VILLAGE LOCAL CENTRE					BROCKHURST ROAD LOCAL CENTRE					TOTAL LOCAL CENTRES				
	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028	2011	2016	2021	2026	2028
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	264	265	271	278	281	377	379	387	397	402	4,012	4,037	4,122	4,225	4,281
2	315	317	323	332	336	0	0	0	0	0	315	317	323	332	336
3	0	0	0	0	0	0	0	0	0	0	88	89	90	93	94
4	79	79	81	83	84	0	0	0	0	0	2,029	2,042	2,085	2,137	2,165
5	0	0	0	0	0	0	0	0	0	0	463	481	507	537	551
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	224	230	242	255	260
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**657**	**661**	**675**	**692**	**701**	**377**	**379**	**387**	**397**	**402**	**7,131**	**7,196**	**7,370**	**7,578**	**7,687**

Source: Tables 3 & 12

Neighbourhood Centres

Table 14
Convenience Goods Allocation - % Market Share

Catchment Zone	NEIGHBOURHOOD CENTRES				
	2011	2016	2021	2026	2028
	(%)	(%)	(%)	(%)	(%)
1	4	4	4	4	4
2	4	4	4	4	4
3	1	1	1	1	1
4	3	3	3	3	3
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	10	10	10	10	10
10	1	1	1	1	1

Source: Gosport Telephone Survey, January 2007

Table 15
Convenience Goods Allocation - Spend (£) 2009 Prices

Catchment Zone	NEIGHBOURHOOD CENTRES				
	2011	2016	2021	2026	2028
	(£000)	(£000)	(£000)	(£000)	(£000)
1	2,448	2,464	2,516	2,578	2,613
2	828	834	851	872	884
3	420	423	432	443	449
4	899	905	924	947	960
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	966	991	1,042	1,097	1,121
10	106	108	114	120	122
TOTALS	**5,668**	**5,725**	**5,878**	**6,057**	**6,149**

Source: ables 3 & 14

Table 16
Gosport Convenience Goods Floorspace

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Morrisons	2,299	90%	2,069	13,054	27,010
Iceland	343	100%	343	7,143	2,450
Other	742	100%	742	3,000	2,226
SUB TOTAL	**3,384**		**3,154**	**10,046**	**31,686**

Source: Gosport Borough Council/IGD

Table 17
Stoke Road Convenience Goods Floorspace

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Waitrose	1,024	90%	922	11,270	10,386
Other	98	100%	98	3,000	294
SUB TOTAL	**1,122**		**1,020**	**10,475**	**10,680**

Source: Gosport Borough Council/IGD

Table 18
Lee-On-The-Solent Convenience Goods Floorspace

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op	530	80%	424	9,688	4,108
Other	637	100%	637	3,000	1,911
SUB TOTAL	**1,167**		**1,061**	**5,673**	**6,019**

Source: Gosport Borough Council/IGD

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 19
Local and Neighbourhood Centres Convenience Goods Floorspace

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Gregson Avenue Neighbourhood Centre	278	90%	250	9,688	2,424
Co-Op, Rowner Road Neighbourhood Centre	315	90%	284	9,688	2,747
Lidl, Forton Rd/Crossways Neighbourhood Centre	641	90%	577	2,987	1,723
Co-Op, Forton Rd/Crossways Neighbourhood Centre	159	90%	143	9,688	1,386
One Stop, Alverstoke Village	134	90%	121	5,240	632
Other Local Centres	363	100%	363	3,000	1,089
Neighbourhood Centres	3,700	100%	3,700	3,000	11,100
SUB TOTAL	**5,590**		**5,437**	**3,881**	**21,101**

Source: Gosport Borough Council/IGD

Table 20
Gosport Out Of Centre Convenience Goods Floorspace

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
OUT OF CENTRE					
Asda, Dock Road	2,914	75%	2,186	14,933	32,636
Tesco Express, Carless Close	159	90%	143	13,510	1,933
TOTAL	**2,914**		**2,329**	**14,846**	**34,569**

Source: IGD

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 21
Retail Convenience Commitments

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)	Average Turnover 2028 (£000s)
NewTesco Foodstore, Rowner	1,858	80%	1,486	13,510	20,081	20,283	20,589	20,900	21,025
Extension to Lidl, Forton Road Local Centre	183	100%	183	2,987	547	552	560	569	572
New Tesco Express, Lee-on-the-Solent	250	100%	250	13,510	3,378	3,411	3,463	3,515	3,536
TOTAL	**2,041**		**1,919**	**12,507**	**24,005**	**24,246**	**24,612**	**24,984**	**25,134**

Source: Gosport Borough Council

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Capacity Projections: Convenience Goods

Table 22
Future Shop Floorspace Capacity in Gosport Borough

	CONVENIENCE GOODS				
	2011	2016	2021	2026	2028
Residents Spending (£000)	92,471	117,401	95,232	97,736	99,083
Existing Shop Floorspace (sq m net)	13,001	13,001	13,001	13,001	13,001
Sales per sq m net £	7,113	8,004	8,084	8,165	8,198
Sales from Existing Floorspace (£000)	92,471	104,056	105,100	106,156	106,581
Sales from Committed Floorspace (£000)	0	24,246	24,612	24,984	25,134
Residual Spending to Support new shops (£000)	0	-10,901	-34,480	-33,403	-32,632
Sales per sq m net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	**0**	**-1,090**	**-3,448**	**-3,340**	**-3,263**

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Capacity Projections: Convenience Goods

Table 23
Future Shop Floorspace Capacity in Gosport Borough - Market Share Uplift (to 18%)

	CONVENIENCE GOODS				
	2011	2016	2021	2026	2028
Total Available Expenditure (£000)	584,024	597,469	624,276	653,926	667,365
Market Share from Survey Area (%)	16	18	18	18	18
Residents Spending (£000)	92,471	107,544	112,370	117,707	120,126
Existing Shop Floorspace (sq m net)	13,001	13,001	13,001	13,001	13,001
Sales per sq m net £	7,113	8,004	8,004	8,004	8,004
Sales from Existing Floorspace (£000)	92,471	104,056	104,056	104,056	104,056
Sales from Committed Floorspace (£000)	0	24,246	24,612	24,984	25,134
Residual Spending to Support new shops (£000)	0	-20,758	-16,298	-11,333	-9,064
Sales per sq m net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	**0**	**-2,076**	**-1,630**	**-1,133**	**-906**

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Capacity Projections: Convenience Goods

Table 24
Future Shop Floorspace Capacity in Gosport Borough - Market Share Uplift (to 21%)

	CONVENIENCE GOODS				
	2011	2016	2021	2026	2028
Total Available Expenditure (£000)	584,024	597,469	624,276	653,926	667,365
Market Share from Survey Area (%)	16	21	21	21	21
Residents Spending (£000)	92,471	125,468	131,098	137,324	140,147
Existing Shop Floorspace (sq m net)	13,001	13,001	13,001	13,001	13,001
Sales per sq m net £	7,113	8,004	8,004	8,004	8,004
Sales from Existing Floorspace (£000)	92,471	104,056	104,056	104,056	104,056
Sales from Committed Floorspace (£000)	0	24,246	24,612	24,984	25,134
Residual Spending to Support new shops (£000)	0	-2,834	2,430	8,285	10,957
Sales per sq m net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	**0**	**-283**	**243**	**829**	**1,096**

Appendix II
Large Foodstore Impact Tables

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 1
Survey Area Population Forecasts

Catchment Zone	Postcode Sector Groupings	2011	2016	2021	2026	2028
1	PO12 1/3/4	36,425	35,951	35,521	35,271	35,245
2	PO12 2	10,064	9,933	9,814	9,745	9,738
3	PO13 8/9	18,710	18,466	18,245	18,117	18,104
4	PO13 0	15,111	14,914	14,735	14,632	14,621
5	PO14 1/2/3	25,079	25,530	26,070	26,746	27,061
6	PO16 0/7/8/9	32,177	32,609	33,437	34,211	34,512
7	PO6 1/2/3/4	38,974	39,222	39,878	40,692	41,017
8	PO1 1/4/5, PO2 0/7/8/9, PO3 5/6, PO4 0/8/9, PO5 1/2/4	139,880	140,771	143,124	146,047	147,215
9	PO1 3	7,610	7,658	7,786	7,945	8,009
10	PO12, PO5 3	11,962	12,038	12,239	12,489	12,589
TOTAL		**335,992**	**337,092**	**340,849**	**345,894**	**348,110**

Source: Experian Micromarketer, July 2011 & Gosport Borough Council 2011

Notes:
(1) Zone 1-4 Best Fit Boundary with Gosport Borough Council / Zone 7-10 Best Fit Boundary with Portsmouth City Council
(2) Population Growth / Fall in line with RSS population projections

Table 1A
Population Growth Rates

2011-2016 (%)	2016-2021 (%)	2021-2026 (%)	2026-2028 (%)	2011-2028 (%)
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
-1.3	-1.2	-0.7	-0.1	-3.2
1.8	2.1	2.6	1.2	7.9
1.3	2.5	2.3	0.9	7.3
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.6	1.7	2.0	0.8	5.2
0.3	**1.1**	**1.5**	**0.6**	**3.6**

GOSPORT BOROUGH COUNCIL
Gosport Retail Study Update 2011

Table 2
Survey Area Retail Expenditure Forecasts Per Capita (2009 prices) - Convenience Goods

Growth in convenience goods per capita retail expenditure:

2009 - 2010 0.3% pa
2010 - 2011 0.0% pa
2011 - 2016 0.6% pa
2016 - 2028 0.7% pa

ZONE	2009	2009 Minus SFT at 3.5%	2011	2011 Minus SFT at 4.0%	2016	2015 Minus SFT at 5.0%	2021	2021 Minus SFT at 5.2%	2026	2026 Minus SFT at 5.5%	2028	2028 Minus SFT at 5.5%
1	1,790	1,727	1,795	1,724	1,850	1,757	1,916	1,816	1,984	1,874	2,011	1,901
2	1,934	1,866	1,940	1,862	1,999	1,899	2,070	1,962	2,143	2,025	2,173	2,054
3	1,809	1,746	1,814	1,742	1,870	1,776	1,936	1,835	2,005	1,894	2,033	1,921
4	1,802	1,739	1,807	1,735	1,862	1,769	1,928	1,828	1,997	1,887	2,025	1,914
5	1,862	1,797	1,868	1,793	1,924	1,828	1,993	1,889	2,063	1,950	2,092	1,977
6	1,937	1,869	1,943	1,865	2,002	1,902	2,073	1,965	2,146	2,028	2,177	2,057
7	1,810	1,747	1,815	1,743	1,871	1,777	1,937	1,836	2,006	1,895	2,034	1,922
8	1,795	1,732	1,800	1,728	1,855	1,762	1,921	1,821	1,989	1,880	2,017	1,906
9	1,294	1,249	1,298	1,246	1,337	1,270	1,385	1,313	1,434	1,355	1,454	1,374
10	1,697	1,638	1,702	1,634	1,754	1,666	1,816	1,722	1,880	1,777	1,907	1,802

Source: Experian E-Marketer, July 2011

Table 3
Survey Area Retail Expenditure Forecasts (2009 prices)

Zone	Convenience Goods				
	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2028 (£000)
1	62,781	63,180	64,503	66,113	66,992
2	18,741	18,860	19,255	19,736	19,998
3	32,590	32,797	33,484	34,319	34,776
4	26,219	26,385	26,938	27,610	27,978
5	44,964	46,671	49,246	52,150	53,506
6	60,013	62,013	65,706	69,393	70,987
7	67,924	69,698	73,224	77,126	78,836
8	241,765	248,080	260,629	274,520	280,604
9	9,481	9,729	10,221	10,766	11,004
10	19,545	20,056	21,070	22,193	22,685
Total	**584,024**	**597,469**	**624,276**	**653,926**	**667,365**

Source: Table 1 & 2

GOSPORT BOROUGH COUNCIL
Gosport Impact Assessment

2011 Baseline Position - No New Development

Table 4
Convenience Goods Allocation 2011 - % Market Share

Catchment Zone	Tesco Extra Portsmouth (%)	Asda Fareham (%)	Asda Gosport (%)	Asda Portsmouth (%)	Sainsbury's Portsmouth (%)	Sainsbury's Fareham (%)	Morrison's Portsmouth (%)	Morrison's Gosport (%)	Waitrose Gosport (%)	Co-Op Lee-on-Solent (%)	Tesco Express Carless Close (%)	Lidl Forton Rd (%)	Other (%)	**TOTAL** (%)
1	1.6	13.7	40.1	0.4	0.0	0.4	0.0	18.0	2.8	0.2	0.8	2.5	19.4	100.0
2	1.0	1.3	37.1	0.0	0.0	1.7	0.0	19.1	22.4	0.0	0.0	0.0	17.4	100.0
3	0.6	31.9	21.2	0.0	0.0	4.8	0.0	8.1	3.8	10.9	2.9	0.0	15.9	100.0
4	2.3	44.8	9.8	0.6	0.0	3.0	0.3	9.1	1.3	0.0	0.3	0.0	28.5	100.0
5	0.7	36.6	1.0	0.0	0.7	11.2	0.0	0.0	1.4	0.0	0.0	0.0	48.3	100.0
6	23.5	10.5	0.7	0.0	0.7	26.5	0.0	0.0	0.0	0.0	0.0	0.0	38.1	100.0
7	29.8	0.0	0.0	0.7	15.2	1.4	2.4	0.0	0.0	0.0	0.0	0.3	50.2	100.0
8	14.7	0.0	0.0	17.9	9.7	0.3	9.6	0.0	0.0	0.0	0.0	0.0	47.7	100.0
9	3.5	0.0	0.0	17.3	5.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	74.0	100.0
10	14.2	0.0	0.0	8.7	1.1	0.0	0.0	0.0	0.0	0.5	1.1	0.0	74.3	100.0

SOURCE: Gosport Telephone Survey, January 2007

Table 5
Convenience Goods Allocation 2011 - Spend (£) 2009 Prices

Catchment Zone	Tesco Extra Portsmouth (£000's)	Asda Fareham (£000's)	Asda Gosport (£000's)	Asda Portsmouth (£000's)	Sainsbury's Portsmouth (£000's)	Sainsbury's Fareham (£000's)	Morrison's Portsmouth (£000's)	Morrison's Gosport (£000's)	Waitrose Gosport (£000's)	Co-Op Lee-on-Solent (£000's)	Tesco Express Carless Close (£000's)	Lidl Forton Rd (£000's)	Other (£000's)	**TOTAL (%)**
1	1,011	8,595	25,200	264	0	264	0	11,288	1,783	132	527	1,563	12,154	**62,781**
2	193	249	6,946	0	0	311	0	3,570	4,204	0	0	0	3,268	**18,741**
3	183	10,390	6,893	0	0	1,571	0	2,633	1,245	3,559	935	0	5,182	**32,590**
4	593	11,754	2,572	165	0	776	79	2,373	349	0	79	0	7,480	**26,219**
5	315	16,461	463	0	315	5,045	0	0	629	0	0	0	21,735	**44,964**
6	14,121	6,313	420	0	420	15,886	0	0	0	0	0	0	22,853	**60,013**
7	20,255	0	0	475	10,324	924	1,623	0	0	0	0	224	34,098	**67,924**
8	35,636	0	0	43,228	23,451	798	23,258	0	0	0	0	0	115,394	**241,765**
9	332	0	0	1,643	491	0	0	0	0	0	0	0	7,015	**9,481**
10	2,783	0	0	1,702	219	0	0	0	0	106	219	0	14,516	**19,545**
TOTAL	**75,421**	**53,762**	**42,494**	**47,477**	**35,221**	**25,574**	**24,960**	**19,864**	**8,210**	**3,796**	**1,760**	**1,787**	**243,697**	**584,024**

SOURCE: Tables 3 and 4

GOSPORT BOROUGH COUNCIL
Gosport Impact Assessment

2016 Baseline Position - No New Development

Table 6
Convenience Goods Allocation 2016 - % Market Share

Catchment Zone	Tesco Extra Portsmouth (%)	Asda Fareham (%)	Asda Gosport (%)	Asda Portsmouth (%)	Sainsbury's Portsmouth (%)	Sainsbury's Fareham (%)	Morrison's Portsmouth (%)	Morrison's Gosport (%)	Waitrose Gosport (%)	Co-Op Lee-on-Solent (%)	Tesco Express Carless Close (%)	Lidl Forton Rd (%)	Other (%)	TOTAL (%)
1	1.6	13.7	40.1	0.4	0.0	0.4	0.0	18.0	2.8	0.2	0.8	2.5	19.4	100.0
2	1.0	1.3	37.1	0.0	0.0	1.7	0.0	19.1	22.4	0.0	0.0	0.0	17.4	100.0
3	0.6	31.9	21.2	0.0	0.0	4.8	0.0	8.1	3.8	10.9	2.9	0.0	15.9	100.0
4	2.3	44.8	9.8	0.6	0.0	3.0	0.3	9.1	1.3	0.0	0.3	0.0	28.5	100.0
5	0.7	36.6	1.0	0.0	0.7	11.2	0.0	0.0	1.4	0.0	0.0	0.0	48.3	100.0
6	23.5	10.5	0.7	0.0	0.7	26.5	0.0	0.0	0.0	0.0	0.0	0.0	38.1	100.0
7	29.8	0.0	0.0	0.7	15.2	1.4	2.4	0.0	0.0	0.0	0.0	0.3	50.2	100.0
8	14.7	0.0	0.0	17.9	9.7	0.3	9.6	0.0	0.0	0.0	0.0	0.0	47.7	100.0
9	3.5	0.0	0.0	17.3	5.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	74.0	100.0
10	14.2	0.0	0.0	8.7	1.1	0.0	0.0	0.0	0.0	0.5	1.1	0.0	74.3	100.0

SOURCE: Gosport Telephone Survey, January 2007

Table 7
Convenience Goods Allocation 2016 - Spend (£) 2009 Prices

Catchment Zone	Tesco Extra Portsmouth (£000's)	Asda Fareham (£000's)	Asda Gosport (£000's)	Asda Portsmouth (£000's)	Sainsbury's Portsmouth (£000's)	Sainsbury's Fareham (£000's)	Morrison's Portsmouth (£000's)	Morrison's Gosport (£000's)	Waitrose Gosport (£000's)	Co-Op Lee-on-Solent (£000's)	Tesco Express Carless Close (£000's)	Lidl Forton Rd (£000's)	Other (£000's)	TOTAL (%)
1	1,017	8,649	25,360	265	0	265	0	11,360	1,794	133	531	1,573	12,232	**63,180**
2	194	251	6,990	0	0	313	0	3,593	4,230	0	0	0	3,289	**18,860**
3	184	10,456	6,937	0	0	1,581	0	2,650	1,253	3,581	941	0	5,215	**32,797**
4	596	11,829	2,588	166	0	781	79	2,388	351	0	79	0	7,528	**26,385**
5	327	17,086	481	0	327	5,236	0	0	653	0	0	0	22,561	**46,671**
6	14,592	6,524	434	0	434	16,415	0	0	0	0	0	0	23,614	**62,013**
7	20,784	0	0	488	10,594	948	1,666	0	0	0	0	230	34,988	**69,698**
8	36,567	0	0	44,357	24,064	819	23,865	0	0	0	0	0	118,409	**248,080**
9	341	0	0	1,686	504	0	0	0	0	0	0	0	7,198	**9,729**
10	2,856	0	0	1,747	225	0	0	0	0	108	225	0	14,895	**20,056**
TOTAL	**77,457**	**54,794**	**42,790**	**48,709**	**36,147**	**26,358**	**25,610**	**19,990**	**8,282**	**3,822**	**1,776**	**1,803**	**249,929**	**597,469**

SOURCE: Tables 3 and 6

GOSPORT BOROUGH COUNCIL
Gosport Impact Assessment

Table 8
Convenience Goods Commitments

	Net Floorspace (sqm)	Net Convenience Ratio (1) (%)	Net Convenience Floorspace (sqm)	Company Average Sales (£ per sqm net)	Average Turnover 2011 (£000s)	Average Turnover 2016 (2) (£000s)	Trade Draw from Study Area (3) (%)	Trade Draw from Study Area (£000s)
Tesco Foodstore, Rowner	1,858	80%	1,486	13,510	20,081	20,283	100%	20,283
Extension to Lidl, Forton Road Local Centre	183	100%	183	2,987	547	552	100%	552
New Tesco, Fareham Town Centre	3,990	75%	2,993	13,510	40,429	40,835	50%	20,417

Source: GVA, 2011 / Gosport BC / Fareham BC

Notes

(1) Tesco, Rowner - assumption based on Condition 17 of decision notice dated 24 July 2009 (Application Ref: K.17671);
Lidl, Forton Road - GVA assumption.
Tesco, Fareham - assumption dervied from Allsop Verril Planning and Retail Statement dated October 2007 (paragrpah 4.95).

(2) To account for growth in sales efficeincy, we have made an allowance for the convenience turnover of the proposal to grow at a rate of 0.2% per annum between 2011 and 2016; and 0.3% per annum between 2016 and 2028.

(3) Estimate based on GVA assumption and analysis of Allop Verrill Planning and Retail Statement dated October 2007.

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Table 9
Large Foodstore Development Scenarios

Scenario	Net Floorspace (sqm)	Net Convenience Ratio (1) (%)	Net Convenience Floorspace (sqm)	Company Average Sales (2) (£ per sq m net)	Average Turnover 2011 (£000s)	Average Turnover 2016 (3) (£000s)	Average Turnover 2021 (3) (£000s)
1	2,788	90%	2,509	13,700	34,376	34,721	35,245
2	5,576	80%	4,461	13,700	61,113	61,727	62,658

Source: Gosport Borough Council / GVA, 2011

Notes

(1) GVA assumption based on professional judgement.

(2) We have assumed a sales density of £13,700 per sqm at 2011 for convenience goods which is the average convenience sales densities of three of the 'Big 4' operators - Tesco, Sainsbury's and Asda - dervied from Verdict's UK Food and Grocery Retailers 2010 report. We have not included Morrisons sales density in this calculation given that the retailer is already represented in Gosport town centre.

(3) To account for growth in sales efficeincy, we have made an allowance for the convenience turnover of the proposal to grow at a rate of 0.2% per annum between 2011 and 2016; and 0.3% per annum between 2016 and 2028.

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Table 10
Impact Summary - Sites A, B and C

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 Scenario 1**	Impact Scenario 1 (£000)	Impact Scenario 1 (%)	**2016 Scenario 2**	Impact Scenario 2 (£000)	Impact Scenario 2 (%)
New Foodstore Development (Scenario 1)	-	-	-	-	**34,721**	-	-	**-**	-	-
New Foodstore Development (Scenario 2)	-	-	-	-	**-**	-	-	**61,727**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	**70,884**	-19	-0.03%	**70,869**	-34	-0.05%
Asda, Fareham	54,794	43,465	-11,329	-20.7%	**35,160**	-8,305	**-19.1%**	**28,701**	-14,764	**-34.0%**
Asda, Gosport	42,790	36,199	-6,591	-15.4%	**25,003**	-11,196	**-30.9%**	**16,295**	-19,904	**-55.0%**
Asda, Portsmouth	48,709	48,666	-43	-0.1%	**48,666**	0	0.0%	**48,666**	0	0.0%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	**35,924**	0	0.0%	**35,924**	0	0.0%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	**21,280**	-19	-0.1%	**21,266**	-34	-0.2%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	**25,571**	0	0.0%	**25,571**	0	0.0%
Morrisons, Gosport	19,990	17,421	-2,569	-12.9%	**10,136**	-7,285	**-41.8%**	**4,469**	-12,952	**-74.3%**
Waitrose, Gosport	8,282	7,674	-608	-7.3%	**4,873**	-2,801	**-36.5%**	**2,695**	-4,979	**-64.9%**
Co-op, Lee-on-the-Solent	3,822	3,740	-82	-2.2%	**3,740**	0	0.0%	**3,740**	0	0.0%
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	**1,652**	0	0.0%	**1,652**	0	0.0%
Lidl, Forton Road	1,803	2,355	552	30.6%	**2,039**	-316	**-13.4%**	**1,794**	-562	**-23.8%**
Tesco, Rowner	-	20,283	-	-	**18,018**	-2,265	**-11.2%**	**16,257**	-4,026	**-19.8%**
Tesco Extra, Fareham	-	20,417	-	-	**19,494**	-923	**-4.5%**	**18,776**	-1,642	**-8.0%**
Other	249,929	241,900	-8,030	-3.2%	**240,307**	-1,593	-0.7%	**239,068**	-2,831	-1.2%

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Table 10A
Impact Summary - Site D

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 WITH Scenario 1**	Impact WITH Scenario 1 (£000)	Impact WITH Scenario 1 (%)	**2016 WITH Scenario 2**	Impact WITH Scenario 2 (£000)	Impact WITH Scenario 2 (%)
New Foodstore Development (Scenario 1)	-	-	-	-	**33,454**	-	-	**-**	-	-
New Foodstore Development (Scenario 2)	-	-	-	-	**-**	-	-	**59,474**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	**70,899**	-4	-0.01%	**70,896**	-6	-0.01%
Asda, Fareham	54,794	43,465	-11,329	-20.7%	**33,576**	-9,889	**-22.8%**	**25,884**	-17,581	**-40.4%**
Asda, Gosport	42,790	36,199	-6,591	-15.4%	**28,262**	-7,937	**-21.9%**	**22,088**	-14,111	**-39.0%**
Asda, Portsmouth	48,709	48,666	-43	-0.1%	**48,666**	0	0.0%	**48,666**	0	0.0%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	**35,924**	0	0.0%	**35,924**	0	0.0%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	**21,143**	-156	-0.7%	**21,021**	-278	-1.3%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	**25,571**	0	0.0%	**25,571**	0	0.0%
Morrisons, Gosport	19,990	17,421	-2,569	-12.9%	**12,271**	-5,150	**-29.6%**	**8,265**	-9,156	**-52.6%**
Waitrose, Gosport	8,282	7,674	-608	-7.3%	**6,623**	-1,051	**-13.7%**	**5,806**	-1,868	**-24.3%**
Co-op, Lee-on-the-Solent	3,822	3,740	-82	-2.2%	**3,740**	0	0.0%	**3,740**	0	0.0%
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	**1,652**	0	0.0%	**1,652**	0	0.0%
Lidl, Forton Road	1,803	2,355	552	30.6%	**2,141**	-214	**-9.1%**	**1,974**	-381	**-16.2%**
Tesco, Rowner	-	20,283	-	-	**17,775**	-2,508	**-12.4%**	**15,825**	-4,458	**-22.0%**
Tesco Extra, Fareham	-	20,417	-	-	**17,059**	-3,358	**-16.4%**	**14,447**	-5,970	**-29.2%**
Other	249,929	241,900	-8,030	-3.2%	**238,713**	-3,187	-1.3%	**236,235**	-5,665	-2.3%

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Table 11
CUMULATIVE Impact Summary - Sites A, B and C

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 Scenario 1 AND Commitments**	Impact Scenario 1 AND Commitments (£000)	Impact Scenario 1 AND Commitments (%)	**2016 Scenario 2 AND Commitments**	Impact Scenario 2 AND Commitments (£000)	Impact Scenario 2 AND Commitments (%)
New Foodstore Development (Scenario 1)	-	-	-	-	**34,721**	-	-	**-**	-	-
New Foodstore Development (Scenario 2)	-	-	-	-	**-**	-	-	**61,727**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	**70,884**	-6,574	-8.5%	**70,869**	-6,588	-8.5%
Asda, Fareham	54,794	43,465	-11,329	-20.7%	**35,160**	-19,634	**-35.8%**	**28,701**	-26,093	**-47.6%**
Asda, Gosport	42,790	36,199	-6,591	-15.4%	**25,003**	-17,787	**-41.6%**	**16,295**	-26,495	**-61.9%**
Asda, Portsmouth	48,709	48,666	-43	-0.1%	**48,666**	-43	-0.1%	**48,666**	-43	-0.1%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	**35,924**	-223	-0.6%	**35,924**	-223	-0.6%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	**21,280**	-5,078	-19.3%	**21,266**	-5,093	-19.3%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	**25,571**	-40	-0.2%	**25,571**	-40	-0.2%
Morrisons, Gosport	19,990	17,421	-2,569	-12.9%	**10,136**	-9,855	-49.3%	**4,469**	-15,521	-77.6%
Waitrose, Gosport	8,282	7,674	-608	-7.3%	**4,873**	-3,409	-41.2%	**2,695**	-5,587	-67.5%
Co-op, Lee-on-the-Solent	3,822	3,740	-82	-2.2%	**3,740**	-82	-2.2%	**3,740**	-82	-2.2%
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	**1,652**	-123	-6.9%	**1,652**	-123	-6.9%
Lidl, Forton Road	1,803	2,355	552	30.6%	**2,039**	236	**13.1%**	**1,794**	-9	**-0.5%**
Tesco, Rowner	-	20,283	-	-	**18,018**	-2,265	**-11.2%**	**16,257**	-4,026	**-19.8%**
Tesco Extra, Fareham	-	20,417	-	-	**19,494**	-923	**-4.5%**	**18,776**	-1,642	**-8.0%**
Other	249,929	241,900	-8,030	-3.2%	**240,307**	-9,622	-3.9%	**239,068**	-10,861	-4.3%

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Table 11A
CUMULATIVE Impact Summary - Site D

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 Scenario 1 AND Commitments**	Impact Scenario 1 AND Commitments (£000)	Impact Scenario 1 AND Commitments (%)	**2016 Scenario 2 AND Commitments**	Impact Scenario 2 AND Commitments (£000)	Impact Scenario 2 AND Commitments (%)
New Foodstore Development (Scenario 1)	-	-	-	-	**33,454**	-	-	**-**	-	-
New Foodstore Development (Scenario 2)	-	-	-	-	**-**	-	-	**59,474**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	**70,899**	-6,558	-8.5%	**70,896**	-6,561	-8.5%
Asda, Fareham	54,794	43,465	-11,329	-20.7%	**33,576**	-21,218	**-38.7%**	**25,884**	-28,910	**-52.8%**
Asda, Gosport	42,790	36,199	-6,591	-15.4%	**28,262**	-14,528	**-34.0%**	**22,088**	-20,702	**-48.4%**
Asda, Portsmouth	48,709	48,666	-43	-0.1%	**48,666**	-43	-0.1%	**48,666**	-43	-0.1%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	**35,924**	-223	-0.6%	**35,924**	-223	-0.6%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	**21,143**	-5,215	-19.8%	**21,021**	-5,337	-20.2%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	**25,571**	-40	-0.2%	**25,571**	-40	-0.2%
Morrisons, Gosport	19,990	17,421	-2,569	-12.9%	**12,271**	-7,720	-38.6%	**8,265**	-11,725	-58.7%
Waitrose, Gosport	8,282	7,674	-608	-7.3%	**6,623**	-1,659	-20.0%	**5,806**	-2,476	-29.9%
Co-op, Lee-on-the-Solent	3,822	3,740	-82	-2.2%	**3,740**	-82	-2.2%	**3,740**	-82	-2.2%
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	**1,652**	-123	-6.9%	**1,652**	-123	-6.9%
Lidl, Forton Road	1,803	2,355	552	30.6%	**2,141**	338	**18.7%**	**1,974**	171	**9.5%**
Tesco, Rowner	-	20,283	-	-	**17,775**	-2,508	**-12.4%**	**15,825**	-4,458	**-22.0%**
Tesco Extra, Fareham	-	20,417	-	-	**17,059**	-3,358	**-16.4%**	**14,447**	-5,970	**-29.2%**
Other	249,929	241,900	-8,030	-3.2%	**238,713**	-11,216	-4.5%	**236,235**	-13,695	-5.5%

Appendix III Daedalus Impact Tables

GOSPORT BOROUGH COUNCIL
Daedalus Impact Assessment

Table 1
Convenience Floorspace Scenarios

Scenario	Net Floorspace (sqm)	Net Convenience Ratio (Note 1) (%)	Net Convenience Floorspace (sqm)	Company Average Sales (Note 2) (£ per sq m net)	Average Turnover 2011 (£000s)	Average Turnover 2016 (Note 3) (£000s)	Turnover from within Survey Area (£000s)
1	800	100%	800	10,000	8,000	8,080	5,656
2	500	100%	500	10,000	5,000	5,050	3,535
3	200	100%	200	10,000	2,000	2,020	1,414

Source: GVA, 2011

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Table 2
Impact Summary

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 WITH 800 sqm net store**	Impact WITH 800 sqm net store (£000)	Impact WITH 800 sqm net store (%)	**2016 WITH 500 sqm net store**	Impact WITH 500 sqm net store (£000)	Impact WITH 500 sqm net store (%)	**2016 WITH 200 sqm net store**	Impact WITH 200 sqm net store (£000)	Impact WITH 200 sqm net store (%)
800 sqm net store	-	-	-	-	**5,656**	-	-	-	-	-	-	-	-
500 sqm net store	-	-	-	-	-	-	-	**3,535**	-	-	-	-	-
200 sqm net store	-	-	-	-	-	-	-	-	-	-	**1,414**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	70,902	0	0.0%	70,902	0	0.0%	70,902	0	0.0%
Asda, Fareham	54,794	42,350	-12,445	-22.7%	42,350	0	0.0%	42,350	0	0.0%	42,350	0	0.0%
Asda, Gosport	42,790	35,379	-7,411	-17.3%	35,379	0	0.0%	35,379	0	0.0%	35,379	0	0.0%
Asda, Portsmouth	48,709	48,666	-43	-0.1%	48,666	0	0.0%	48,666	0	0.0%	48,666	0	0.0%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	35,924	0	0.0%	35,924	0	0.0%	35,924	0	0.0%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	21,299	0	0.0%	21,299	0	0.0%	21,299	0	0.0%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	25,571	0	0.0%	25,571	0	0.0%	25,571	0	0.0%
Morrisons, Gosport	19,990	17,257	-2,733	-13.7%	17,257	0	0.0%	17,257	0	0.0%	17,257	0	0.0%
Waitrose, Gosport	8,282	7,510	-772	-9.3%	7,510	0	0.0%	7,510	0	0.0%	7,510	0	0.0%
Co-op, Lee-on-the-Solent	**3,822**	**2,920**	**-902**	**-23.6%**	**296**	**-2,624**	**-89.8%**	**1,280**	**-1,640**	**-56.2%**	**2,264**	**-656**	**-22.5%**
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	1,652	0	0.0%	1,652	0	0.0%	1,652	0	0.0%
Lidl, Forton Road	1,803	2,355	552	30.6%	2,355	0	0.0%	2,355	0	0.0%	2,355	0	0.0%
Tesco, Rowner	-	20,283	-	-	20,283	0	0.0%	20,283	0	0.0%	20,283	0	0.0%
Tesco, Lee-on-the-Solent	-	**3,411**	-	-	**788**	**-2,624**	**-76.9%**	**1,772**	**-1,640**	**-48.1%**	**2,755**	**-656**	**-19.2%**
Tesco Extra, Fareham	-	20,417	-	-	20,417	-	-	20,417	-	-	20,417	-	-
Other	249,929	241,571	-8,358	-3.3%	241,162	-409	-0.2%	241,316	-255	-0.1%	241,469	-102	0.0%

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Table 3
CUMULATIVE Impact Summary

	2016 No Development	2016 WITH Commitments	Impact WITH Commitments (£000)	Impact WITH Commitments (%)	**2016 800 sqm net store AND Commitments**	Impact 800 sqm net store AND Commitments (£000)	Impact 800 sqm net store AND Commitments (%)	**2016 500 sqm net AND Commitments**	Impact 500 sqm net AND Commitments (£000)	Impact 500 sqm net AND Commitments(%)	**2016 200 sqm net AND Commitments**	Impact 200 sqm net AND Commitments (£000)	Impact 200 sqm net AND Commitments(%)
800 sqm net store	-	-	-	-	**5,656**	-	-	-	-	-	-	-	-
500 sqm net store	-	-	-	-	-	-	-	**3,535**	-	-	-	-	-
200 sqm net store	-	-	-	-	-	-	-	-	-	-	**1,414**	-	-
Tesco Extra, Portsmouth	77,457	70,902	-6,555	-8.5%	70,902	-6,555	-8.5%	70,902	-6,555	-8.5%	70,902	-6,555	-8.5%
Asda, Fareham	54,794	42,350	-12,445	-22.7%	42,350	-12,445	-22.7%	42,350	-12,445	-22.7%	42,350	-12,445	-22.7%
Asda, Gosport	42,790	35,379	-7,411	-17.3%	35,379	-7,411	-17.3%	35,379	-7,411	-17.3%	35,379	-7,411	-17.3%
Asda, Portsmouth	48,709	48,666	-43	-0.1%	48,666	-43	-0.1%	48,666	-43	-0.1%	48,666	-43	-0.1%
Sainsbury's, Portsmouth	36,147	35,924	-223	-0.6%	35,924	-223	-0.6%	35,924	-223	-0.6%	35,924	-223	-0.6%
Sainsbury's, Fareham	26,358	21,299	-5,059	-19.2%	21,299	-5,059	-19.2%	21,299	-5,059	-19.2%	21,299	-5,059	-19.2%
Morrisons, Portsmouth	25,610	25,571	-40	-0.2%	25,571	-40	-0.2%	25,571	-40	-0.2%	25,571	-40	-0.2%
Morrisons, Gosport	19,990	17,257	-2,733	-13.7%	17,257	-2,733	-13.7%	17,257	-2,733	-13.7%	17,257	-2,733	-13.7%
Waitrose, Gosport	8,282	7,510	-772	-9.3%	7,510	-772	-9.3%	7,510	-772	-9.3%	7,510	-772	-9.3%
Co-op, Lee-on-the-Solent	**3,822**	**2,920**	**-902**	**-23.6%**	**296**	**-3,526**	**-92.2%**	**1,280**	**-2,542**	**-66.5%**	**2,264**	**-1,558**	**-40.8%**
Tesco Express, Carless Close	1,776	1,652	-123	-6.9%	1,652	-123	-6.9%	1,652	-123	-6.9%	1,652	-123	-6.9%
Lidl, Forton Road	1,803	2,355	552	30.6%	2,355	552	30.6%	2,355	552	30.6%	2,355	552	30.6%
Tesco, Rowner	-	20,283	-	-	20,283	0	0.0%	20,283	0	0.0%	20,283	0	0.0%
Tesco, Lee-on-the-Solent	-	**3,411**	-	-	**788**	**-2,624**	**-76.9%**	**1,772**	**-1,640**	**-48.1%**	**2,755**	**-656**	**-19.2%**
Tesco Extra, Fareham	-	20,417	-	-	20,417	-	-	20,417	-	-	20,417	-	-
Other	249,929	241,571	-8,358	-3.3%	241,162	-8,767	-3.5%	241,316	-8,614	-3.4%	241,469	-8,460	-3.4%