



South Hampshire Town Centres: Sub-Regional Study 2005

Final Report

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APPENDIX 1
OUTLINE DESCRIPTION OF KEY
PERFORMANCE INDICATORS

PPS6 Key Performance Indicators of Vitality & Viability

1.01 The health of Eastleigh, Fareham, Gosport, Havant, Portsmouth, Southampton and Southsea centres has been assessed using the Key Performance Indicators (hereafter referred to as KPI) of vitality and viability outlined in PPS6 *‘Planning for Town Centres’* (March 2005). These are detailed below:

i. Diversity of uses

Detailed analysis of the mix of uses in a centre can help to identify any potential weaknesses and/or gaps in a centre’s retail and service provision.

ii. Retailer representation and demand

Retailer representation, notably from national multiple operators, and the level of demand for representation in a centre provides a key indicator of its attractiveness and commercial viability. Generally speaking, the higher the level of demand the more attractive the centre is to new investment and development.

It is important to note that new retailers seeking to move into a centre do not solely generate demand for floorspace. Demand is also generated by existing retailers seeking to relocate elsewhere within a centre, possibly because their existing units are too small, or because the ‘retail gravity’ and footfall in the centre may have changed.

iii. Rental levels

The level of rent which operators are prepared to pay for prime retail space in a centre is another indication of the perceived strength of that centre. Although there are a number of considerations that dictate rental values, the key underlying factor is the issue of demand and supply.

iv. Vacancies

Vacancy rates (expressed as a proportion of total outlets) provide a good indication of the relative health of centres. Large numbers of empty properties, particularly where associated with long-term vacancies, can point to local performance problems and a lack of investor confidence. Vacant units can also have a negative impact on the perceived attractiveness of a centre.

v. Commercial yields

A further comparison of retail performance is provided by an assessment of investment yields. In brief terms, yield is a measure of property value; it is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of the capital value. In this way, the higher the yield the lower the rental is valued and vice-versa. A higher yield is an indication of concern by investors that rental income might grow less rapidly and be less secure than a property with a low yield.

vi. Pedestrian flows

Pedestrian flow-counts provide a direct measure of the number and movement of people in different parts of a centre at various times of the day. As such they provide an indication of:

- a centre's overall attractiveness;
- the commercial importance of individual streets and the location of the prime pitch;
- the significance of key retailers and shop clusters within streets;
- pedestrian links across the centre.

When compared over a period of years, pedestrian surveys provide a good indicator of pedestrian growth or decline within a centre. They also allow more detailed analysis of the changes in flows in particular streets and consideration of what action can be taken to increase flows.

vii. Accessibility

The key question that needs to be addressed under this heading is whether a centre is accessible by a choice of means of transport (rail, tram, bus, car, bike and on foot) from all parts of its catchment.

viii. Customer and resident's views

In order to provide an insight into retailer, customer and resident's views on a centre, surveys and stakeholder workshops need to be undertaken. Their purpose is to examine patterns of shopping and expenditure, the use of modes of transport to and from the centre and to canvas views on the general perceptions of the centre.

The household surveys are addressed in **Section X**, but it should be noted that no specific retailer or shopper survey has been commissioned in connection with this study. As a key performance indicator of vitality and viability outlined in PPS6, we strongly advise the local planning authorities to consider commissioning these surveys in due course.

ix. Perception of safety and occurrence of crime

The Crime and Disorder Act (1998) placed a statutory duty on the District Council, County Council and Constabulary to work together to reduce crime and disorder in their locality.

As it stands, we are unaware of any published data, statistics and crime reduction initiatives specifically relating to the PUSH centres. Our visual inspections of each centre, have pinpointed cctv cameras strategically positioned throughout each centre, including some car parks, providing comprehensive coverage.

x. Environmental quality

The attractiveness of the built environment and public realm is an important determinant of the relative success and performance of a centre. Despite being subjective, it is an important KPI to consider when assessing the vitality and viability of a centre.

- 1.02 Not all of the above indicators can be usefully applied in this study. For example, pedestrian flow counts would need to be undertaken over a number of years on a controlled basis in order to ascertain the scale of any change. Similarly, shopper surveys would also have to be undertaken on a regular basis in order to gauge any changing views. However, insofar as information addressing the PPS6 indicators is available, we set out our observations below.

APPENDIX 2

GOAD CATEGORY CENTRE REPORT FOR SOUTHAMPTON

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	7,800	0.22	0.66	33
Butchers	0	0.00	0.28	0
Confectionery, Tobacco & News	8,100	0.23	0.47	49
Convenience Stores	3,500	0.10	0.39	25
Fishmongers	0	0.00	0.04	0
Frozen Foods	0	0.00	0.62	0
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	1,000	0.03	0.37	8
Health Foods	5,500	0.15	0.21	74
Markets	0	0.00	0.80	0
Off Licences	5,900	0.17	0.30	55
Shoe Repairs & Key Cutting	400	0.01	0.10	11
Supermarkets	89,700	2.51	6.56	38
Total Convenience	121,900	3.42	10.93	31
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	4,400	0.12	0.31	40
Booksellers	18,900	0.53	0.48	111
Carpets & Flooring	23,600	0.66	0.48	139
Catalogue Showrooms	31,200	0.87	0.56	156
Charity Shops	5,500	0.15	0.88	17
Chemist & Drugstores	21,600	0.61	1.28	47
Childrens & Infants Wear	40,000	1.12	0.54	209
Clothing General	200,000	5.60	2.51	223
Crafts, Gifts, China & Glass	17,800	0.50	0.60	83
Cycles & Accessories	0	0.00	0.13	0
Department & Variety Stores	543,300	15.22	5.24	290
DIY & Home Improvement	5,700	0.16	1.12	14
Electrical & Other Durable Goods	47,600	1.33	1.18	113
Florists	2,200	0.06	0.25	25
Footwear	43,100	1.21	0.96	125
Furniture Fitted	5,400	0.15	0.25	60
Furniture General	124,800	3.50	1.66	210
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	13,000	0.36	0.64	57
Hardware & Household Goods	28,300	0.79	1.82	43
Jewellery, Watches & Silver	20,400	0.57	0.65	87
Ladies & Mens Wear & Acc.	15,100	0.42	0.59	72
Ladies Wear & Accessories	107,800	3.02	2.58	117
Leather & Travel Goods	2,900	0.08	0.11	74
Mens Wear & Accessories	35,200	0.99	0.71	140
Music & Musical Instruments	4,400	0.12	0.11	112
Music & Video Recordings	11,700	0.33	0.39	84
Newsagents & Stationers	9,700	0.27	0.62	44
Office Supplies	32,800	0.92	0.11	831
Other Comparison Goods	9,300	0.26	0.52	50
Photographic & Optical	4,200	0.12	0.09	124
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	62,500	1.75	1.03	170
Telephones & Accessories	15,100	0.42	0.43	99

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	24,700	0.69	0.61	113
Toiletries, Cosmetics & Beauty Products	23,400	0.66	0.66	99
Toys, Games & Hobbies	77,100	2.16	0.59	365
Vehicle & Motorcycle Sales	40,600	1.14	0.57	201
Vehicle Accessories	10,300	0.29	0.25	115
Total Comparison	1,683,600	47.17	31.93	148
Retail Service				
Clothing & Fancy Dress Hire	0	0.00	0.03	0
Dry Cleaners & Launderettes	900	0.03	0.30	8
Filling Stations	0	0.00	0.07	0
Health & Beauty	31,000	0.87	2.05	42
Opticians	15,000	0.42	0.63	67
Other Retail Services	0	0.00	0.24	0
Photo Processing	2,900	0.08	0.13	65
Photo Studio	1,100	0.03	0.07	47
Post Offices	2,800	0.08	0.44	18
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	20,900	0.59	0.65	91
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	2,200	0.06	0.04	150
Vehicle Repairs & Services	6,000	0.17	0.53	31
Video Tape Rental	1,700	0.05	0.27	18
Total Retail Service	84,500	2.37	5.51	43
Other Retail				
Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0
Total Retail	1,890,000	52.95		
Service				
Leisure Services				
Bars & Wine Bars	69,300	1.94	1.65	118
Bingo & Amusements	20,600	0.58	0.89	65
Cafes	22,600	0.63	1.02	62
Casinos & Betting Offices	18,600	0.52	0.58	89
Cinemas, Theatres & Concert Halls	41,700	1.17	1.22	96
Clubs	12,700	0.36	1.18	30
Disco, Dance & Nightclubs	71,400	2.00	0.35	567
Fast Food & Take Away	37,200	1.04	1.77	59
Hotels & Guest Houses	131,100	3.67	1.24	296
Public Houses	78,200	2.19	3.50	63
Restaurants	49,300	1.38	2.52	55
Sports & Leisure Facilities	48,300	1.35	1.18	115
Total Leisure Services	601,000	16.84	17.12	98
Financial & Business Services				
Building Societies	11,400	0.32	0.37	87
Building Supplies & Services	700	0.02	0.48	4
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	12,300	0.34	0.30	115
Financial Services	17,600	0.49	0.79	62
Legal Services	0	0.00	0.69	0

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	5,700	0.16	0.28	57
Printing & Copying	0	0.00	0.19	0
Property Services	0	0.00	1.42	0
Retail Banks	54,700	1.53	2.67	57
Total Financial & Business Services	102,400	2.87	7.24	40
Public Services				
Educational Institutions	17,100	0.48	1.03	46
Emergency Services	0	0.00	0.51	0
Government & Municipal Buildings	142,400	3.99	2.48	161
Information & Advice Centres	7,700	0.22	0.36	61
Libraries, Museums & Art Galleries	0	0.00	0.95	0
Total Public Services	167,200	4.68	5.32	88
Health & Medical Services				
Medical Services	700	0.02	0.75	3
Total Health & Medical Services	700	0.02	0.75	3
Religious Services				
Religious Institutions	9,900	0.28	1.79	16
Total Religious Services	9,900	0.28	1.79	16
Transport Services				
Car Parks	231,700	6.49	5.03	129
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	4,900	0.14	0.27	51
Total Transport Services	236,600	6.63	5.36	124
Total Service	1,117,800	31.32		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	21,500	0.60	0.71	85
Total Vacant Non-Retail	21,500	0.60	0.71	85
Vacant Retail				
Vacant Retail/Service	159,500	4.47	5.48	82
Total Vacant Retail	159,500	4.47	5.48	82
Total Vacant	181,000	5.07		
Commerce				
General Offices				
Offices	100,100	2.80	5.43	52
Sorting Office	0	0.00	0.29	0
Total General Offices	100,100	2.80	5.72	49
Industrial Activities				
Works, Warehouses & Factories	272,400	7.63	1.08	706
Total Industrial Activities	272,400	7.63	1.08	706
Unclassified Building				
Entrance & Stores	4,000	0.11	0.87	13

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southampton Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 19/05/2004

Category		Floorspace sq ft	Area %	Base %	Index
	Total				
	Unclassified Building	4,000	0.11	0.87	13
<hr/>					
Wholesale Trade					
	Wholesalers	3,800	0.11	0.08	132
	Total Wholesale Trade	3,800	0.11	0.08	132
<hr/>					
	Total Commerce	380,300	10.66		
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	Centre Total	3,569,100 sq ft (Ground Floor footprint)			
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Goad Centre Category Report

(Outlet Count)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	6	0.88	1.48	59
Butchers	0	0.00	0.61	0
Confectionery, Tobacco & News	8	1.17	1.18	99
Convenience Stores	2	0.29	0.50	58
Fishmongers	0	0.00	0.11	0
Frozen Foods	0	0.00	0.26	0
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	1	0.15	0.67	22
Health Foods	5	0.73	0.47	157
Markets	0	0.00	0.11	0
Off Licences	2	0.29	0.54	54
Shoe Repairs & Key Cutting	1	0.15	0.41	35
Supermarkets	2	0.29	0.69	42
Total Convenience	27	3.94	7.36	54
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	3	0.44	0.66	66
Booksellers	6	0.88	0.63	139
Carpets & Flooring	2	0.29	0.49	60
Catalogue Showrooms	3	0.44	0.18	246
Charity Shops	4	0.58	1.80	32
Chemist & Drugstores	2	0.29	0.95	31
Childrens & Infants Wear	8	1.17	0.68	173
Clothing General	33	4.82	1.81	267
Crafts, Gifts, China & Glass	13	1.90	1.37	139
Cycles & Accessories	0	0.00	0.20	0
Department & Variety Stores	8	1.17	0.65	180
DIY & Home Improvement	3	0.44	0.68	65
Electrical & Other Durable Goods	7	1.02	1.53	67
Florists	2	0.29	0.76	38
Footwear	17	2.48	1.37	181
Furniture Fitted	2	0.29	0.33	88
Furniture General	15	2.19	1.13	194
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	5	0.73	1.08	68
Hardware & Household Goods	3	0.44	1.22	36
Jewellery, Watches & Silver	17	2.48	1.71	145
Ladies & Mens Wear & Acc.	8	1.17	0.62	187
Ladies Wear & Accessories	42	6.13	3.72	165
Leather & Travel Goods	1	0.15	0.24	62
Mens Wear & Accessories	15	2.19	1.03	213
Music & Musical Instruments	1	0.15	0.20	75
Music & Video Recordings	5	0.73	0.44	167
Newsagents & Stationers	3	0.44	0.55	79
Office Supplies	2	0.29	0.09	340
Other Comparison Goods	3	0.44	0.69	63
Photographic & Optical	4	0.58	0.22	268
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	9	1.31	0.97	135
Telephones & Accessories	14	2.04	0.96	214

Goad Centre Category Report

(Outlet Count)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	5	0.73	0.89	82
Toiletries, Cosmetics & Beauty Products	11	1.61	0.71	226
Toys, Games & Hobbies	16	2.34	0.89	262
Vehicle & Motorcycle Sales	3	0.44	0.29	149
Vehicle Accessories	1	0.15	0.26	55
Total Comparison	296	43.21	32.76	132

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.06	0
Dry Cleaners & Launderettes	1	0.15	0.78	19
Filling Stations	0	0.00	0.16	0
Health & Beauty	25	3.65	5.04	72
Opticians	7	1.02	1.24	82
Other Retail Services	0	0.00	0.38	0
Photo Processing	3	0.44	0.41	107
Photo Studio	1	0.15	0.15	95
Post Offices	1	0.15	0.31	47
Repairs, Alterations & Restoration	0	0.00	0.21	0
Travel Agents	8	1.17	1.32	88
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	1	0.15	0.05	280
Vehicle Repairs & Services	2	0.29	0.45	65
Video Tape Rental	1	0.15	0.33	44
Total Retail Service	50	7.30	10.90	67

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	373	54.45
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Service

Leisure Services

Bars & Wine Bars	11	1.61	1.26	127
Bingo & Amusements	4	0.58	0.50	116
Cafes	15	2.19	2.32	94
Casinos & Betting Offices	5	0.73	0.95	77
Cinemas, Theatres & Concert Halls	1	0.15	0.22	66
Clubs	4	0.58	0.77	76
Disco, Dance & Nightclubs	2	0.29	0.15	191
Fast Food & Take Away	25	3.65	4.05	90
Hotels & Guest Houses	6	0.88	0.43	203
Public Houses	20	2.92	2.92	100
Restaurants	23	3.36	3.54	95
Sports & Leisure Facilities	3	0.44	0.25	178
Total Leisure Services	119	17.37	17.38	100

Financial & Business Services

Building Societies	5	0.73	0.52	139
Building Supplies & Services	1	0.15	0.58	25
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	10	1.46	0.62	237
Financial Services	8	1.17	1.46	80

Goad Centre Category Report

(Outlet Count)



Centre: Southampton Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 19/05/2004

Category	Outlets	Area %	Base %	Index
Legal Services	0	0.00	1.02	0
Other Business Services	4	0.58	0.27	219
Printing & Copying	0	0.00	0.34	0
Property Services	0	0.00	2.85	0
Retail Banks	15	2.19	2.37	92
Total Financial & Business Services	43	6.28	10.08	62
Public Services				
Educational Institutions	1	0.15	0.36	41
Emergency Services	0	0.00	0.14	0
Government & Municipal Buildings	8	1.17	1.02	114
Information & Advice Centres	2	0.29	0.57	51
Libraries, Museums & Art Galleries	0	0.00	0.36	0
Total Public Services	11	1.61	2.46	65
Health & Medical Services				
Medical Services	1	0.15	0.90	16
Total Health & Medical Services	1	0.15	0.90	16
Religious Services				
Religious Institutions	2	0.29	0.68	43
Total Religious Services	2	0.29	0.68	43
Transport Services				
Car Parks	21	3.07	2.40	127
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	1	0.15	0.27	55
Total Transport Services	22	3.21	2.94	109
Total Service	198	28.91		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	4	0.58	0.41	143
Total Vacant Non-Retail	4	0.58	0.41	143
Vacant Retail				
Vacant Retail/Service	57	8.32	7.91	105
Total Vacant Retail	57	8.32	7.91	105
Total Vacant	61	8.91		
Commerce				
General Offices				
Offices	29	4.23	3.89	109
Sorting Office	0	0.00	0.09	0
Total General Offices	29	4.23	3.98	106
Industrial Activities				
Works, Warehouses & Factories	20	2.92	0.47	620
Total Industrial Activities	20	2.92	0.47	620
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Southampton Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 19/05/2004

Category	Outlets	Area %	Base %	Index
Entrance & Stores	3	0.44	1.56	28
Total Unclassified Building	3	0.44	1.56	28
<hr/>				
Wholesale Trade				
Wholesalers	1	0.15	0.08	172
Total Wholesale Trade	1	0.15	0.08	172
<hr/>				
Total Commerce	53	7.74		
<hr/>				
Centre Total	685	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Southampton Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 19/05/2004

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	148	21.61	39.28	55
Between 1,000 and 2,499 square feet	269	39.27	39.51	99
Between 2,500 and 4,999 square feet	129	18.83	12.59	150
Between 5,000 and 9,999 square feet	73	10.66	5.05	211
Between 10,000 and 14,999 square feet	21	3.07	1.48	207
Between 15,000 and 19,999 square feet	10	1.46	0.68	216
Between 20,000 and 29,999 square feet	18	2.63	0.66	396
30,000 square feet and above	17	2.48	0.74	334

APPENDIX 3
SOUTHAMPTON RETAILER REQUIREMENTS

Southampton Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
Best Cellars	Public Houses	A3/A4/A5	3,000	3,000	279	279
Blubeckers	Restaurant	A3/A4/A5	3,000	3,000	279	279
Caffe Nero	Café	A3/A4/A5	800	1,500	74	139
Costa	Café	A3/A4/A5	750	2,000	70	186
EAT	Fastfood/Takeaway	A3/A4/A5	750	2,500	70	232
Elbow Room	Café/Restaurant/Bar	A3/A4/A5	2,500	12,000	232	1,115
Ha Ha Bar	Public Houses	A3/A4/A5	5,000	6,000	465	557
KFC	Fastfood/Takeaway	A3/A4/A5	2,550	2,900	237	269
Krispy Kreme Donuts	Fastfood/Takeaway	A3/A4/A5	2,500	4,000	232	372
La Tasca	Restaurant	A3/A4/A5	2,500	4,500	232	418
Las Iguanas	Café/Restaurant/Bar	A3/A4/A5	3,500	5,000	325	465
Love Juice	Café/Restaurant/Bar	A3/A4/A5	100	200	9	19
The McKenzie Group	Discos/Leisure Facilities	A3/A4/A5	12,000	30,000	1,115	2,787
Millie's Cookies	Fastfood/Takeaway	A3/A4/A5	300	500	28	46
Nandos	Café/Restaurant/Bar	A3/A4/A5	2,500	3,500	232	325
O'Briens Irish Sandwich Bars	Fastfood/Takeaway	A3/A4/A5	200	1,400	19	130
Pasty Presto	Café/Restaurant/Bar	A3/A4/A5	300	2,500	28	232
Pizza Hut	Café/Restaurant/Bar	A3/A4/A5	2,900	3,500	269	325
Pizza Express	Café/Restaurant/Bar	A3/A4/A5	1,750	3,000	163	279
Presto	Café/Restaurant/Bar	A3/A4/A5	300	500	28	46
Pret A Manger	Fastfood/Takeaway	A3/A4/A5	500	1,500	46	139
Regent Inns	Public Houses	A3/A4/A5	6,000	16,000	557	1,486
Roosters Chicken	Fastfood/Takeaway	A3/A4/A5	500	1,500	46	139
Santa Fe	Café/Restaurant/Bar	A3/A4/A5	3,000	6,000	279	557
SFI Group	Public Houses	A3/A4/A5	3,000	9,000	279	836
Sports Café	Café/Restaurant/Bar	A3/A4/A5	10,000	15,000	929	1,394
Spur	Restaurant	A3/A4/A5	1,000	1,000	93	93
Toby Carvery	Restaurant	A3/A4/A5	7,000	7,000	650	650
Tuscany	Restaurant	A3/A4/A5	2,500	2,500	232	232
Vintage Inns	Public Houses	A3/A4/A5	7,000	7,000	650	650
Wagamama	Café/Restaurant/Bar	A3/A4/A5	3,500	5,000	325	465
Sub Total			91,200	163,000	8,472	15,143

99p Stores	Discount Stores	COMPARISON	3,000	10,000	279	929
Again	Charity Shops	COMPARISON	2,250	2,750	209	255
Apple	Computers & Software	COMPARISON	4,000	4,000	372	372
Bags Etc	Bags	COMPARISON	1,700	1,700	158	158
Beaverbrooks	Jewellers	COMPARISON	1,000	1,300	93	121
Beds Direct	Furniture	COMPARISON	1,700	8,000	158	743
Bookworld	Booksellers	COMPARISON	1,200	3,000	111	279
Brantano	Shoe Shops	COMPARISON	5,000	7,500	465	697
Cancer & Leukaemia	Charity Shops	COMPARISON	600	600	56	56
The Carphone Warehouse	Mobile Phones	COMPARISON	1,000	2,000	93	186
The Computer Shop	Computers & Software	COMPARISON	1,300	1,300	121	121
Confetti	Gift Shops	COMPARISON	2,250	3,000	209	279
Cook & Wash	Homeware	COMPARISON	1,500	4,000	139	372
Decathlon	Sports & Leisure Wear	COMPARISON	20,000	60,000	1,858	5,574
Deichmann Shoes	Shoe Shops	COMPARISON	3,000	3,500	279	325
Desire By Debenhams	Women's wear	COMPARISON	17,500	22,500	1,626	2,090
Dr China	Medical	COMPARISON	350	1,400	33	130
Dreams	Furniture	COMPARISON	5,000	7,500	465	697
Ecco Shoes	Shoe Shops	COMPARISON	753	861	70	80
Ego Shego Shoes	Shoe Shops	COMPARISON	700	1,200	65	111
Esprit	Women's Wear	COMPARISON	4,000	7,000	372	650
Field & Trek	Sports & Leisure Wear	COMPARISON	1,500	5,000	139	465
Fired Earth	Household	COMPARISON	4,000	6,000	372	557
Fopp Records	Records	COMPARISON	3,000	5,000	279	465
Formula One Auto Centres	Vehicular	COMPARISON	2,500	10,000	232	929
The Fragrance Shop	Cosmetics/Toiletries	COMPARISON	250	800	23	74
Frank	Clothing	COMPARISON	850	1,000	79	93
Gerry Weber	Women's Wear	COMPARISON	1,500	3,000	139	279
Herbmedic	Chinese Medicine Centre	COMPARISON	500	1,000	46	93
House Of Fraser	Department Stores	COMPARISON	100,000	200,000	9,290	18,580
HPJ The Jewellers	Jewellers	COMPARISON	800	1,200	74	111
In Toto Kitchens	Furniture	COMPARISON	850	850	79	79
Jessop Photo Centres	Photographic Equipment	COMPARISON	750	1,250	70	116
Krisp Clothing Co.	Women's Wear	COMPARISON	1,000	1,500	93	139
Lakeland	Household	COMPARISON	4,000	6,000	372	557
Levi Strauss	Jeans Shops	COMPARISON	1,000	1,600	93	149

Linens Direct	Household	COMPARISON	2,000	4,000	186	372
Live Again	Household	COMPARISON	5,400	6,600	502	613
Lombok	Furniture	COMPARISON	4,000	10,000	372	929
Matalan	Clothing	COMPARISON	20,000	40,000	1,858	3,716
Menkind Stores	Gift Shops/Fancy Goods	COMPARISON	1,000	1,800	93	167
Moda In Pelle	Shoe Shops	COMPARISON	300	1,200	28	111
Murphy & NYE	Sports & Leisure Wear	COMPARISON	1,400	3,200	130	297
Musicroom	Music Sales	COMPARISON	1,500	2,000	139	186
New Heights	Furniture	COMPARISON	2,500	12,000	232	1,115
O2	Mobile Phones	COMPARISON	300	300	28	28
Office	Shoe Shops	COMPARISON	1,500	1,500	139	139
Officers Club	Men's Wear	COMPARISON	2,500	3,000	232	279
Oil & Vinegar	Gift Shops/Fancy Goods	COMPARISON	800	2,000	74	186
Oliver Bonas	Gift Shops/Fancy Goods	COMPARISON	500	1,250	46	116
Original Stone Co.	Flooring Services	COMPARISON	750	1,200	70	111
Panasonic	Electrical/Durable Goods	COMPARISON	900	1,500	84	139
Ponden Mill	Fabrics	COMPARISON	1,500	3,000	139	279
Professional Cookware Company	Homeware	COMPARISON	750	1,500	70	139
Pulse Perfumes	Cosmetics/Toiletries	COMPARISON	1,500	2,500	139	232
PunkyFish	Clothing	COMPARISON	850	1,000	79	93
REN	Cosmetics/Toiletries	COMPARISON	100	1,000	9	93
Right Price	Household	COMPARISON	1,500	3,000	139	279
Savers Health & Beauty	Cosmetics/Toiletries	COMPARISON	2,000	2,500	186	232
The Shaw Trust	Charity Shops	COMPARISON	1,000	3,000	93	279
Shoe Zone	Shoe Shops	COMPARISON	1,000	2,500	93	232
Signarama	Signs & Nameplates	COMPARISON	1,000	2,000	93	186
Slater	Men's Wear	COMPARISON	5,000	8,000	465	743
Sound Control	Video/Hi-Fi/Audio Visual	COMPARISON	5,000	15,000	465	1,394
Sue Ryder Foundation	Charity Shops	COMPARISON	500	500	46	46
Superdrug	Chemists	COMPARISON	1,500	6,000	139	557
Swatch	Jewellers	COMPARISON	250	1,250	23	116
Tiles R Us	Flooring coverings	COMPARISON	5,000	7,500	465	697
TJ Hughes	Department Stores	COMPARISON	25,000	150,000	2,323	13,935
TK Maxx	Variety/Discount Stores	COMPARISON	20,000	30,000	1,858	2,787
Topsy Turvy World	Service/Specialist	COMPARISON	10,000	15,000	929	1,394
Totally Mobile	Mobile Phones	COMPARISON	1,500	2,500	139	232

Treds	Shoe Shops	COMPARISON	750	750	70	70
Uniqlo	Clothing	COMPARISON	4,000	6,000	372	557
Wade	Furniture	COMPARISON	2,000	3,000	186	279
The Watch Hospital	Jewellers	COMPARISON	100	300	9	28
Sub Total			337,453	756,661	31,349	70,294
Aldi	Supermarkets	CONVENIENCE	14,600	14,600	1,356	1,356
Bakers Oven	Bakers	CONVENIENCE	1,200	2,500	111	232
Farmfoods	Food	CONVENIENCE	5,000	8,000	465	743
Gourmet Joes New York Pretzel Co.	Bakers	CONVENIENCE	100	600	9	56
Greggs	Bakers	CONVENIENCE	800	1,200	74	111
Iceland Foods	Supermarkets	CONVENIENCE	3,000	3,000	279	279
Montezumas Chocolates	Confectionary	CONVENIENCE	250	500	23	46
Morris Pasties	Bakers	CONVENIENCE	300	750	28	70
Oddbins	Off Licences	CONVENIENCE	1,200	2,500	111	232
Paxton & Whitfield	Food	CONVENIENCE	2,000	3,000	186	279
Sub Total			28,450	36,650	2,643	3,405
Esporta Health & Fitness Clubs	Leisure/Sports	LEISURE	50,000	80,000	4,645	7,432
Virgin Active	Leisure/Sports	LEISURE	45,000	55,000	4,181	5,110
Sub Total			95,000	135,000	8,826	12,542
City Gent	Hairdressers	SERVICE	500	700	46	65
Dignity Funerals	Funeral Directors	SERVICE	900	1,500	84	139
Headmasters	Hairdressers	SERVICE	1,000	2,000	93	186
Johnson Cleaners	Dry Cleaners	SERVICE	600	1,400	56	130
Regis	Hairdressers	SERVICE	900	1,000	84	93
Toni & Guy	Hairdressers	SERVICE	750	1,000	70	93
Tote Bookmakers	Bookmakers	SERVICE	800	1,500	74	139
Trailfinders	Travel Agents	SERVICE	800	1,500	74	139
Vets4Pets	Veterinary	SERVICE	2,000	2,500	186	232
Sub Total			8,250	13,100	766	1,217
TOTAL			560,353	1,104,411	52,057	102,600

APPENDIX 4
GOAD CATEGORY CENTRE REPORT FOR
PORTSMOUTH

Goad Centre Category Report

(Floorspace sq ft)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	6,600	0.46	0.66	70
Butchers	900	0.06	0.28	22
Confectionery, Tobacco & News	1,500	0.11	0.47	23
Convenience Stores	6,300	0.44	0.39	114
Fishmongers	0	0.00	0.04	0
Frozen Foods	6,300	0.44	0.62	72
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	200	0.01	0.37	4
Health Foods	2,800	0.20	0.21	95
Markets	0	0.00	0.80	0
Off Licences	0	0.00	0.30	0
Shoe Repairs & Key Cutting	200	0.01	0.10	14
Supermarkets	111,500	7.84	6.56	120
Total Convenience	136,300	9.58	10.93	88
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	1,900	0.13	0.31	43
Booksellers	7,700	0.54	0.48	113
Carpets & Flooring	1,300	0.09	0.48	19
Catalogue Showrooms	25,000	1.76	0.56	315
Charity Shops	500	0.04	0.88	4
Chemist & Drugstores	17,700	1.24	1.28	97
Childrens & Infants Wear	12,700	0.89	0.54	167
Clothing General	62,400	4.39	2.51	175
Crafts, Gifts, China & Glass	2,300	0.16	0.60	27
Cycles & Accessories	0	0.00	0.13	0
Department & Variety Stores	131,100	9.22	5.24	176
DIY & Home Improvement	0	0.00	1.12	0
Electrical & Other Durable Goods	8,000	0.56	1.18	47
Florists	400	0.03	0.25	11
Footwear	19,600	1.38	0.96	143
Furniture Fitted	0	0.00	0.25	0
Furniture General	5,200	0.37	1.66	22
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	4,200	0.30	0.64	46
Hardware & Household Goods	40,000	2.81	1.82	154
Jewellery, Watches & Silver	9,800	0.69	0.65	105
Ladies & Mens Wear & Acc.	11,500	0.81	0.59	137
Ladies Wear & Accessories	49,900	3.51	2.58	136
Leather & Travel Goods	1,500	0.11	0.11	97
Mens Wear & Accessories	18,100	1.27	0.71	180
Music & Musical Instruments	0	0.00	0.11	0
Music & Video Recordings	9,200	0.65	0.39	165
Newsagents & Stationers	10,800	0.76	0.62	123
Office Supplies	0	0.00	0.11	0
Other Comparison Goods	3,100	0.22	0.52	42
Photographic & Optical	1,800	0.13	0.09	133
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	18,100	1.27	1.03	124
Telephones & Accessories	8,300	0.58	0.43	137

Goad Centre Category Report

(Floorspace sq ft)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	3,900	0.27	0.61	45
Toiletries, Cosmetics & Beauty Products	5,200	0.37	0.66	55
Toys, Games & Hobbies	12,400	0.87	0.59	147
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	0	0.00	0.25	0
Total Comparison	503,600	35.41	31.93	111
Retail Service				
Clothing & Fancy Dress Hire	0	0.00	0.03	0
Dry Cleaners & Launderettes	1,700	0.12	0.30	39
Filling Stations	0	0.00	0.07	0
Health & Beauty	8,500	0.60	2.05	29
Opticians	9,600	0.68	0.63	107
Other Retail Services	0	0.00	0.24	0
Photo Processing	1,700	0.12	0.13	95
Photo Studio	0	0.00	0.07	0
Post Offices	51,800	3.64	0.44	834
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	4,900	0.34	0.65	53
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	0	0.00	0.53	0
Video Tape Rental	0	0.00	0.27	0
Total Retail Service	78,200	5.50	5.51	100
Other Retail				
Other Retail Outlets	600	0.04	0.10	44
Total Other Retail	600	0.04	0.10	44
Total Retail	718,700	50.53		
Service				
Leisure Services				
Bars & Wine Bars	4,800	0.34	1.65	20
Bingo & Amusements	49,500	3.48	0.89	389
Cafes	8,900	0.63	1.02	61
Casinos & Betting Offices	3,000	0.21	0.58	36
Cinemas, Theatres & Concert Halls	5,500	0.39	1.22	32
Clubs	4,600	0.32	1.18	27
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	18,100	1.27	1.77	72
Hotels & Guest Houses	12,900	0.91	1.24	73
Public Houses	76,700	5.39	3.50	154
Restaurants	12,400	0.87	2.52	35
Sports & Leisure Facilities	200	0.01	1.18	1
Total Leisure Services	196,600	13.82	17.12	81
Financial & Business Services				
Building Societies	7,700	0.54	0.37	148
Building Supplies & Services	0	0.00	0.48	0
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	9,900	0.70	0.30	233
Financial Services	1,300	0.09	0.79	12
Legal Services	5,700	0.40	0.69	58

Goad Centre Category Report

(Floorspace sq ft)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	600	0.04	0.28	15
Printing & Copying	4,600	0.32	0.19	166
Property Services	1,300	0.09	1.42	6
Retail Banks	46,900	3.30	2.67	124
Total Financial & Business Services	78,000	5.48	7.24	76
Public Services				
Educational Institutions	43,500	3.06	1.03	296
Emergency Services	0	0.00	0.51	0
Government & Municipal Buildings	74,000	5.20	2.48	210
Information & Advice Centres	8,700	0.61	0.36	172
Libraries, Museums & Art Galleries	12,600	0.89	0.95	93
Total Public Services	138,800	9.76	5.32	183
Health & Medical Services				
Medical Services	0	0.00	0.75	0
Total Health & Medical Services	0	0.00	0.75	0
Religious Services				
Religious Institutions	7,200	0.51	1.79	28
Total Religious Services	7,200	0.51	1.79	28
Transport Services				
Car Parks	104,900	7.38	5.03	147
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	4,300	0.30	0.27	113
Total Transport Services	109,200	7.68	5.36	143
Total Service	529,800	37.25		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.71	0
Total Vacant Non-Retail	0	0.00	0.71	0
Vacant Retail				
Vacant Retail/Service	51,500	3.62	5.48	66
Total Vacant Retail	51,500	3.62	5.48	66
Total Vacant	51,500	3.62		
Commerce				
General Offices				
Offices	113,900	8.01	5.43	148
Sorting Office	0	0.00	0.29	0
Total General Offices	113,900	8.01	5.72	140
Industrial Activities				
Works, Warehouses & Factories	5,300	0.37	1.08	34
Total Industrial Activities	5,300	0.37	1.08	34
Unclassified Building				
Entrance & Stores	3,000	0.21	0.87	24

Goad Centre Category Report

(Floorspace sq ft)



Centre: Portsmouth - Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/03/2005

Category		Floorspace sq ft	Area %	Base %	Index
	Total				
	Unclassified Building	3,000	0.21	0.87	24
<hr/>					
Wholesale Trade					
	Wholesalers	0	0.00	0.08	0
	Total Wholesale Trade	0	0.00	0.08	0
<hr/>					
	Total Commerce	122,200	8.59		
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	Centre Total	1,422,200 sq ft (Ground Floor footprint)			
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Goad Centre Category Report

(Outlet Count)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	5	1.40	1.48	94
Butchers	1	0.28	0.61	46
Confectionery, Tobacco & News	2	0.56	1.18	47
Convenience Stores	3	0.84	0.50	167
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.28	0.26	106
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	1	0.28	0.67	42
Health Foods	2	0.56	0.47	120
Markets	0	0.00	0.11	0
Off Licences	0	0.00	0.54	0
Shoe Repairs & Key Cutting	1	0.28	0.41	68
Supermarkets	2	0.56	0.69	81
Total Convenience	18	5.03	7.36	68
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	1	0.28	0.66	42
Booksellers	2	0.56	0.63	88
Carpets & Flooring	1	0.28	0.49	57
Catalogue Showrooms	2	0.56	0.18	314
Charity Shops	1	0.28	1.80	15
Chemist & Drugstores	1	0.28	0.95	29
Childrens & Infants Wear	3	0.84	0.68	124
Clothing General	12	3.35	1.81	185
Crafts, Gifts, China & Glass	2	0.56	1.37	41
Cycles & Accessories	0	0.00	0.20	0
Department & Variety Stores	5	1.40	0.65	215
DIY & Home Improvement	0	0.00	0.68	0
Electrical & Other Durable Goods	5	1.40	1.53	92
Florists	1	0.28	0.76	37
Footwear	8	2.23	1.37	163
Furniture Fitted	0	0.00	0.33	0
Furniture General	2	0.56	1.13	49
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	3	0.84	1.08	78
Hardware & Household Goods	2	0.56	1.22	46
Jewellery, Watches & Silver	9	2.51	1.71	147
Ladies & Mens Wear & Acc.	4	1.12	0.62	179
Ladies Wear & Accessories	18	5.03	3.72	135
Leather & Travel Goods	2	0.56	0.24	237
Mens Wear & Accessories	9	2.51	1.03	245
Music & Musical Instruments	0	0.00	0.20	0
Music & Video Recordings	2	0.56	0.44	128
Newsagents & Stationers	4	1.12	0.55	203
Office Supplies	0	0.00	0.09	0
Other Comparison Goods	1	0.28	0.69	40
Photographic & Optical	2	0.56	0.22	257
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	5	1.40	0.97	144
Telephones & Accessories	7	1.96	0.96	204

Goad Centre Category Report

(Outlet Count)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	2	0.56	0.89	63
Toiletries, Cosmetics & Beauty Products	2	0.56	0.71	79
Toys, Games & Hobbies	8	2.23	0.89	251
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	0	0.00	0.26	0
Total Comparison	126	35.20	32.76	107

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.06	0
Dry Cleaners & Launderettes	2	0.56	0.78	72
Filling Stations	0	0.00	0.16	0
Health & Beauty	9	2.51	5.04	50
Opticians	4	1.12	1.24	90
Other Retail Services	0	0.00	0.38	0
Photo Processing	2	0.56	0.41	137
Photo Studio	0	0.00	0.15	0
Post Offices	1	0.28	0.31	90
Repairs, Alterations & Restoration	0	0.00	0.21	0
Travel Agents	4	1.12	1.32	85
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.45	0
Video Tape Rental	0	0.00	0.33	0
Total Retail Service	22	6.15	10.90	56

Other Retail

Other Retail Outlets	1	0.28	0.13	221
Total Other Retail	1	0.28	0.13	221

Total Retail	167	46.65
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Service

Leisure Services

Bars & Wine Bars	2	0.56	1.26	44
Bingo & Amusements	7	1.96	0.50	387
Cafes	5	1.40	2.32	60
Casinos & Betting Offices	3	0.84	0.95	88
Cinemas, Theatres & Concert Halls	1	0.28	0.22	126
Clubs	2	0.56	0.77	73
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	16	4.47	4.05	110
Hotels & Guest Houses	1	0.28	0.43	65
Public Houses	23	6.42	2.92	220
Restaurants	8	2.23	3.54	63
Sports & Leisure Facilities	1	0.28	0.25	113
Total Leisure Services	69	19.27	17.38	111

Financial & Business Services

Building Societies	4	1.12	0.52	213
Building Supplies & Services	0	0.00	0.58	0
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	11	3.07	0.62	498
Financial Services	1	0.28	1.46	19

Goad Centre Category Report

(Outlet Count)



Centre: Portsmouth - Central
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/03/2005

Category	Outlets	Area %	Base %	Index
Legal Services	2	0.56	1.02	55
Other Business Services	1	0.28	0.27	105
Printing & Copying	2	0.56	0.34	166
Property Services	2	0.56	2.85	20
Retail Banks	16	4.47	2.37	188
Total Financial & Business Services	39	10.89	10.08	108
Public Services				
Educational Institutions	4	1.12	0.36	310
Emergency Services	0	0.00	0.14	0
Government & Municipal Buildings	4	1.12	1.02	109
Information & Advice Centres	3	0.84	0.57	146
Libraries, Museums & Art Galleries	1	0.28	0.36	77
Total Public Services	12	3.35	2.46	136
Health & Medical Services				
Medical Services	0	0.00	0.90	0
Total Health & Medical Services	0	0.00	0.90	0
Religious Services				
Religious Institutions	1	0.28	0.68	41
Total Religious Services	1	0.28	0.68	41
Transport Services				
Car Parks	13	3.63	2.40	151
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	2	0.56	0.27	210
Total Transport Services	15	4.19	2.94	142
Total Service	136	37.99		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.41	0
Total Vacant Non-Retail	0	0.00	0.41	0
Vacant Retail				
Vacant Retail/Service	22	6.15	7.91	78
Total Vacant Retail	22	6.15	7.91	78
Total Vacant	22	6.15		
Commerce				
General Offices				
Offices	25	6.98	3.89	180
Sorting Office	0	0.00	0.09	0
Total General Offices	25	6.98	3.98	176
Industrial Activities				
Works, Warehouses & Factories	3	0.84	0.47	178
Total Industrial Activities	3	0.84	0.47	178
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Portsmouth - Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/03/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	5	1.40	1.56	89
Total Unclassified Building	5	1.40	1.56	89
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	33	9.22		
<hr/>				
Centre Total	358	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Portsmouth - Central
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/03/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	110	30.73	39.28	78
Between 1,000 and 2,499 square feet	119	33.24	39.51	84
Between 2,500 and 4,999 square feet	75	20.95	12.59	166
Between 5,000 and 9,999 square feet	29	8.10	5.05	160
Between 10,000 and 14,999 square feet	6	1.68	1.48	113
Between 15,000 and 19,999 square feet	4	1.12	0.68	165
Between 20,000 and 29,999 square feet	6	1.68	0.66	252
30,000 square feet and above	9	2.51	0.74	338

APPENDIX 5
PORTSMOUTH RETAILER REQUIREMENTS

Portsmouth Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
Ask	Café/Restaurant/Bar	A3/A4/A5	3,000	3,000	279	279
Best Cellars	Public Houses	A3/A4/A5	3,000	3,000	279	279
Blubeckers	Restaurant	A3/A4/A5	3,000	3,000	279	279
Caffe Nero	Café/Restaurant/Bar	A3/A4/A5	800	1,500	74	139
Cornish Oggy Oggy Pasty Co.	Café/Restaurant/Bar	A3/A4/A5	500	2,000	46	186
Costa	Café/Restaurant/Bar	A3/A4/A5	750	2,000	70	186
EAT	Fastfood/Takeaway	A3/A4/A5	750	2,500	70	232
The Elbow Room	Café/Restaurant/Bar	A3/A4/A5	2,500	12,000	232	1,115
Las Iguanas	Café/Restaurant/Bar	A3/A4/A5	3,500	5,000	325	465
The McKenzie Group	Discos/Leisure	A3/A4/A5	12,000	30,000	1,115	2,787
Pizza Hut	Café/Restaurant/Bar	A3/A4/A5	850	1,000	79	93
Presto	Café/Restaurant/Bar	A3/A4/A5	300	500	28	46
Regent Inns	Public Houses	A3/A4/A5	6,000	16,000	557	1,486
Roosters	Fastfood/Takeaway	A3/A4/A5	500	1,500	46	139
SFI	Public Houses	A3/A4/A5	3,000	9,000	279	836
Spur	Café/Restaurant/Bar	A3/A4/A5	1,000	1,000	93	93
Subway	Fastfood/Takeaway	A3/A4/A5	600	1,800	56	167
Teasers	Café/Restaurant/Bar	A3/A4/A5	6,000	12,000	557	1,115
Toby Carvery	Café/Restaurant/Bar	A3/A4/A5	7,000	7,000	650	650
Wagamama	Café/Restaurant/Bar	A3/A4/A5	3,500	5,000	325	465
Zizzi	Café/Restaurant/Bar	A3/A4/A5	2,000	6,000	186	557
Sub Total			60,550	124,800	5,625	11,594
99p Stores	Discount/Stores	COMPARISON	3,000	10,000	279	929
Again	Charity Shops	COMPARISON	2,250	2,750	209	255
Argos	Variety Stores	COMPARISON	10,000	16,000	929	1,486
Art	Picture Framing	COMPARISON	600	1,200	56	111
Beaverbrooks	Jewellers	COMPARISON	1,000	1,300	93	121
Beds Direct	Furniture	COMPARISON	1,700	8,000	158	743
Bookworld	Booksellers	COMPARISON	1,200	3,000	111	279
Brantano	Shoe Shops	COMPARISON	5,000	7,500	465	697
Brownhills Leisure	Camping Equipment	COMPARISON	1,000	1,000	93	93
The Carphone Warehouse	Mobile Phones	COMPARISON	1,000	2,000	93	186

Claire's Accessories	Ladies Wear & Accessories	COMPARISON	500	1,000	46	93
The Cotswold Co.	Furniture	COMPARISON	4,000	7,000	372	650
Deichmann-Shoes	Shoe Shops	COMPARISON	3,000	3,500	279	325
Dr China	Medical	COMPARISON	350	1,400	33	130
Dreams	Furniture	COMPARISON	5,000	7,500	465	697
Edinburgh Woollen Mill	Knitwear	COMPARISON	2,000	2,000	186	186
Fopp Records	Records	COMPARISON	3,000	5,000	279	465
Formula One Auto Centres	Vehicular	COMPARISON	2,500	10,000	232	929
The Fragrance Shop	Cosmetics/Toiletries	COMPARISON	250	800	23	74
Gamleys	Games & Toys	COMPARISON	2,500	5,000	232	465
Herbmedic Chinese Medicine Centre	Medical	COMPARISON	500	1,000	46	93
HPJ The Jewellers	Jewellers	COMPARISON	800	1,200	74	111
IKEA	Furniture	COMPARISON	270,000	330,000	25,083	30,657
Kidsport	Childcare Leisure/Sports	COMPARISON	20,000	25,000	1,858	2,323
Klaussner	Furniture	COMPARISON	5,000	10,000	465	929
La Senza	Clothing	COMPARISON	2,000	2,000	186	186
Moda In Pelle	Shoe Shops	COMPARISON	300	1,200	28	111
Murphy & Nye	Sports & Leisure Wear	COMPARISON	1,400	3,200	130	297
Office	Shoe Shops	COMPARISON	1,500	1,500	139	139
Peacocks	Variety Stores	COMPARISON	5,000	15,000	465	1,394
The Pier	Homeware	COMPARISON	7,000	7,000	650	650
Right Price	Household	COMPARISON	1,500	3,000	139	279
Robert Dyas	Hardware	COMPARISON	2,000	3,000	186	279
Savers Health & Beauty	Cosmetics/Toiletries	COMPARISON	2,000	2,500	186	232
SCHUH	Shoe Shops	COMPARISON	4,000	6,000	372	557
Sharps	Furniture	COMPARISON	1,800	5,000	167	465
The Shaw Trust	Charity Shops	COMPARISON	1,000	3,000	93	279
Shoe Zone	Shoe Shops	COMPARISON	1,000	2,500	93	232
Silverscreen	Games & Toys	COMPARISON	1,900	3,500	177	325
Slater	Men's Wear	COMPARISON	5,000	8,000	465	743
Softwide	Computers & Software	COMPARISON	700	1,000	65	93
Sue Ryder Foundation	Charity Shops	COMPARISON	500	500	46	46
Superdrug	Chemists	COMPARISON	1,500	6,000	139	557
T-Mobile	Mobile Phones	COMPARISON	400	700	37	65
TJ Hughes	Department Stores	COMPARISON	25,000	150,000	2,323	13,935
TK Maxx	Variety/Discount	COMPARISON	20,000	50,000	1,858	4,645

Topps Tiles	Floor Covering	COMPARISON	3,000	10,000	279	929
USC	Men's Wear	COMPARISON	4,000	6,000	372	557
Zara	Clothing	COMPARISON	10,700	16,150	994	1,500
Zoom The Loom	Household	COMPARISON	1,200	10,000	111	929
Sub Total			450,550	779,900	41,856	72,453
Bakers Oven	Bakers	CONVENIENCE	1,200	2,500	111	232
Gourmet Joes New York Pretzel Co.	Bakers	CONVIENENCE	100	600	9	56
Greggs	Bakers	CONVIENENCE	800	1,200	74	111
Julian Graves	Health Foods	CONVENIENCE	400	1,000	37	93
Morris Pasties	Bakers	CONVENIENCE	300	750	28	70
Sub Total			2,800	6,050	260	562
Castle Gallery	Service/Specialist	SERVICE	1,000	1,000	93	93
Flight Centre	Travel Agents	SERVICE	400	1,000	37	93
Tote	Bookmakers	SERVICE	800	1,500	74	139
Vets4Pets	Veterinary	SERVICE	2,000	2,500	186	232
Sub Total			4,200	6,000	390	557
TOTAL			518,100	916,750	48,131	85,166

APPENDIX 6
GOAD CATEGORY CENTRE REPORT FOR
EASTLEIGH

Goad Centre Category Report

(Floorspace sq ft)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	2,400	0.30	0.66	45
Butchers	1,200	0.15	0.28	53
Confectionery, Tobacco & News	2,600	0.32	0.47	69
Convenience Stores	0	0.00	0.39	0
Fishmongers	0	0.00	0.04	0
Frozen Foods	8,700	1.08	0.62	176
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	0	0.00	0.37	0
Health Foods	2,000	0.25	0.21	120
Markets	0	0.00	0.80	0
Off Licences	0	0.00	0.30	0
Shoe Repairs & Key Cutting	600	0.07	0.10	74
Supermarkets	95,700	11.91	6.56	182
Total Convenience	113,200	14.09	10.93	129
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	0	0.00	0.31	0
Booksellers	5,100	0.63	0.48	133
Carpets & Flooring	0	0.00	0.48	0
Catalogue Showrooms	5,400	0.67	0.56	120
Charity Shops	15,300	1.90	0.88	215
Chemist & Drugstores	7,900	0.98	1.28	77
Childrens & Infants Wear	3,300	0.41	0.54	77
Clothing General	15,500	1.93	2.51	77
Crafts, Gifts, China & Glass	2,800	0.35	0.60	58
Cycles & Accessories	0	0.00	0.13	0
Department & Variety Stores	31,300	3.90	5.24	74
DIY & Home Improvement	5,000	0.62	1.12	55
Electrical & Other Durable Goods	6,500	0.81	1.18	68
Florists	1,900	0.24	0.25	96
Footwear	7,500	0.93	0.96	97
Furniture Fitted	700	0.09	0.25	35
Furniture General	6,200	0.77	1.66	46
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	7,500	0.93	0.64	146
Hardware & Household Goods	8,000	1.00	1.82	55
Jewellery, Watches & Silver	3,800	0.47	0.65	72
Ladies & Mens Wear & Acc.	1,800	0.22	0.59	38
Ladies Wear & Accessories	17,000	2.12	2.58	82
Leather & Travel Goods	0	0.00	0.11	0
Mens Wear & Accessories	4,400	0.55	0.71	78
Music & Musical Instruments	0	0.00	0.11	0
Music & Video Recordings	0	0.00	0.39	0
Newsagents & Stationers	8,000	1.00	0.62	161
Office Supplies	0	0.00	0.11	0
Other Comparison Goods	1,400	0.17	0.52	33
Photographic & Optical	0	0.00	0.09	0
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	4,000	0.50	1.03	48
Telephones & Accessories	4,500	0.56	0.43	131

Goad Centre Category Report

(Floorspace sq ft)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	4,800	0.60	0.61	98
Toiletries, Cosmetics & Beauty Products	9,500	1.18	0.66	178
Toys, Games & Hobbies	5,500	0.68	0.59	116
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	2,200	0.27	0.25	109
Total Comparison	196,800	24.50	31.93	77
Retail Service				
Clothing & Fancy Dress Hire	2,200	0.27	0.03	1,014
Dry Cleaners & Launderettes	2,700	0.34	0.30	111
Filling Stations	0	0.00	0.07	0
Health & Beauty	7,300	0.91	2.05	44
Opticians	3,100	0.39	0.63	61
Other Retail Services	3,500	0.44	0.24	179
Photo Processing	2,000	0.25	0.13	199
Photo Studio	0	0.00	0.07	0
Post Offices	2,400	0.30	0.44	68
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	7,000	0.87	0.65	135
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	0	0.00	0.53	0
Video Tape Rental	1,600	0.20	0.27	74
Total Retail Service	31,800	3.96	5.51	72
Other Retail				
Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0
Total Retail	341,800	42.55		
Service				
Leisure Services				
Bars & Wine Bars	0	0.00	1.65	0
Bingo & Amusements	4,800	0.60	0.89	67
Cafes	3,800	0.47	1.02	46
Casinos & Betting Offices	2,800	0.35	0.58	60
Cinemas, Theatres & Concert Halls	0	0.00	1.22	0
Clubs	13,500	1.68	1.18	142
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	14,000	1.74	1.77	98
Hotels & Guest Houses	0	0.00	1.24	0
Public Houses	20,400	2.54	3.50	73
Restaurants	17,700	2.20	2.52	87
Sports & Leisure Facilities	0	0.00	1.18	0
Total Leisure Services	77,000	9.59	17.12	56
Financial & Business Services				
Building Societies	2,500	0.31	0.37	85
Building Supplies & Services	700	0.09	0.48	18
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	2,200	0.27	0.30	91
Financial Services	6,400	0.80	0.79	101
Legal Services	900	0.11	0.69	16

Goad Centre Category Report

(Floorspace sq ft)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	0	0.00	0.28	0
Printing & Copying	1,000	0.12	0.19	64
Property Services	8,600	1.07	1.42	75
Retail Banks	22,600	2.81	2.67	105
Total Financial & Business Services	44,900	5.59	7.24	77
Public Services				
Educational Institutions	800	0.10	1.03	10
Emergency Services	0	0.00	0.51	0
Government & Municipal Buildings	6,400	0.80	2.48	32
Information & Advice Centres	0	0.00	0.36	0
Libraries, Museums & Art Galleries	10,600	1.32	0.95	139
Total Public Services	17,800	2.22	5.32	42
Health & Medical Services				
Medical Services	0	0.00	0.75	0
Total Health & Medical Services	0	0.00	0.75	0
Religious Services				
Religious Institutions	0	0.00	1.79	0
Total Religious Services	0	0.00	1.79	0
Transport Services				
Car Parks	99,800	12.42	5.03	247
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	4,900	0.61	0.27	227
Total Transport Services	104,700	13.03	5.36	243
Total Service	244,400	30.42		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	4,900	0.61	0.71	86
Total Vacant Non-Retail	4,900	0.61	0.71	86
Vacant Retail				
Vacant Retail/Service	40,200	5.00	5.48	91
Total Vacant Retail	40,200	5.00	5.48	91
Total Vacant	45,100	5.61		
Commerce				
General Offices				
Offices	48,100	5.99	5.43	110
Sorting Office	0	0.00	0.29	0
Total General Offices	48,100	5.99	5.72	105
Industrial Activities				
Works, Warehouses & Factories	0	0.00	1.08	0
Total Industrial Activities	0	0.00	1.08	0
Unclassified Building				
Entrance & Stores	123,900	15.42	0.87	1,766

Goad Centre Category Report

(Floorspace sq ft)



Centre: Eastleigh
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 13/04/2005

Category	Floorspace sq ft	Area %	Base %	Index
Total Unclassified Building	123,900	15.42	0.87	1,766
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	172,000	21.41		
<hr/>				
Centre Total	803,300 sq ft (Ground Floor footprint)			

Goad Centre Category Report

(Outlet Count)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	3	1.19	1.48	80
Butchers	1	0.40	0.61	65
Confectionery, Tobacco & News	1	0.40	1.18	33
Convenience Stores	0	0.00	0.50	0
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.40	0.26	150
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	0	0.00	0.67	0
Health Foods	2	0.79	0.47	170
Markets	0	0.00	0.11	0
Off Licences	0	0.00	0.54	0
Shoe Repairs & Key Cutting	1	0.40	0.41	96
Supermarkets	3	1.19	0.69	171
Total Convenience	12	4.74	7.36	64
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	0	0.00	0.66	0
Booksellers	2	0.79	0.63	125
Carpets & Flooring	0	0.00	0.49	0
Catalogue Showrooms	1	0.40	0.18	222
Charity Shops	12	4.74	1.80	263
Chemist & Drugstores	3	1.19	0.95	125
Childrens & Infants Wear	2	0.79	0.68	117
Clothing General	5	1.98	1.81	109
Crafts, Gifts, China & Glass	2	0.79	1.37	58
Cycles & Accessories	0	0.00	0.20	0
Department & Variety Stores	2	0.79	0.65	122
DIY & Home Improvement	1	0.40	0.68	58
Electrical & Other Durable Goods	6	2.37	1.53	155
Florists	2	0.79	0.76	104
Footwear	4	1.58	1.37	115
Furniture Fitted	1	0.40	0.33	120
Furniture General	3	1.19	1.13	105
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	4	1.58	1.08	146
Hardware & Household Goods	3	1.19	1.22	97
Jewellery, Watches & Silver	4	1.58	1.71	93
Ladies & Mens Wear & Acc.	1	0.40	0.62	63
Ladies Wear & Accessories	7	2.77	3.72	74
Leather & Travel Goods	0	0.00	0.24	0
Mens Wear & Accessories	2	0.79	1.03	77
Music & Musical Instruments	0	0.00	0.20	0
Music & Video Recordings	0	0.00	0.44	0
Newsagents & Stationers	4	1.58	0.55	287
Office Supplies	0	0.00	0.09	0
Other Comparison Goods	1	0.40	0.69	57
Photographic & Optical	0	0.00	0.22	0
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	3	1.19	0.97	122
Telephones & Accessories	4	1.58	0.96	165

Goad Centre Category Report

(Outlet Count)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	3	1.19	0.89	133
Toiletries, Cosmetics & Beauty Products	2	0.79	0.71	111
Toys, Games & Hobbies	5	1.98	0.89	222
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	2	0.79	0.26	300
Total Comparison	91	35.97	32.76	110

Retail Service

Clothing & Fancy Dress Hire	1	0.40	0.06	638
Dry Cleaners & Launderettes	2	0.79	0.78	102
Filling Stations	0	0.00	0.16	0
Health & Beauty	10	3.95	5.04	78
Opticians	3	1.19	1.24	96
Other Retail Services	2	0.79	0.38	209
Photo Processing	2	0.79	0.41	194
Photo Studio	0	0.00	0.15	0
Post Offices	1	0.40	0.31	128
Repairs, Alterations & Restoration	0	0.00	0.21	0
Travel Agents	6	2.37	1.32	180
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.45	0
Video Tape Rental	1	0.40	0.33	119
Total Retail Service	28	11.07	10.90	102

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	131	51.78
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Service

Leisure Services

Bars & Wine Bars	0	0.00	1.26	0
Bingo & Amusements	3	1.19	0.50	235
Cafes	6	2.37	2.32	102
Casinos & Betting Offices	2	0.79	0.95	83
Cinemas, Theatres & Concert Halls	0	0.00	0.22	0
Clubs	3	1.19	0.77	154
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	11	4.35	4.05	107
Hotels & Guest Houses	0	0.00	0.43	0
Public Houses	5	1.98	2.92	68
Restaurants	9	3.56	3.54	100
Sports & Leisure Facilities	0	0.00	0.25	0
Total Leisure Services	39	15.42	17.38	89

Financial & Business Services

Building Societies	1	0.40	0.52	75
Building Supplies & Services	1	0.40	0.58	68
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	2	0.79	0.62	128
Financial Services	4	1.58	1.46	108

Goad Centre Category Report

(Outlet Count)



Centre: Eastleigh
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 13/04/2005

Category	Outlets	Area %	Base %	Index
Legal Services	1	0.40	1.02	39
Other Business Services	0	0.00	0.27	0
Printing & Copying	1	0.40	0.34	118
Property Services	9	3.56	2.85	125
Retail Banks	7	2.77	2.37	117
Total Financial & Business Services	26	10.28	10.08	102
Public Services				
Educational Institutions	1	0.40	0.36	110
Emergency Services	0	0.00	0.14	0
Government & Municipal Buildings	2	0.79	1.02	77
Information & Advice Centres	0	0.00	0.57	0
Libraries, Museums & Art Galleries	2	0.79	0.36	217
Total Public Services	5	1.98	2.46	80
Health & Medical Services				
Medical Services	0	0.00	0.90	0
Total Health & Medical Services	0	0.00	0.90	0
Religious Services				
Religious Institutions	0	0.00	0.68	0
Total Religious Services	0	0.00	0.68	0
Transport Services				
Car Parks	8	3.16	2.40	131
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	1	0.40	0.27	149
Total Transport Services	9	3.56	2.94	121
Total Service	79	31.23		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	1	0.40	0.41	97
Total Vacant Non-Retail	1	0.40	0.41	97
Vacant Retail				
Vacant Retail/Service	20	7.91	7.91	100
Total Vacant Retail	20	7.91	7.91	100
Total Vacant	21	8.30		
Commerce				
General Offices				
Offices	10	3.95	3.89	102
Sorting Office	0	0.00	0.09	0
Total General Offices	10	3.95	3.98	99
Industrial Activities				
Works, Warehouses & Factories	0	0.00	0.47	0
Total Industrial Activities	0	0.00	0.47	0
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Eastleigh
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 13/04/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	12	4.74	1.56	303
Total Unclassified Building	12	4.74	1.56	303
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	22	8.70		
<hr/>				
Centre Total	253	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Eastleigh
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 13/04/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	70	27.67	39.28	70
Between 1,000 and 2,499 square feet	106	41.90	39.51	106
Between 2,500 and 4,999 square feet	47	18.58	12.59	148
Between 5,000 and 9,999 square feet	18	7.11	5.05	141
Between 10,000 and 14,999 square feet	3	1.19	1.48	80
Between 15,000 and 19,999 square feet	1	0.40	0.68	58
Between 20,000 and 29,999 square feet	3	1.19	0.66	179
30,000 square feet and above	5	1.98	0.74	266

APPENDIX 7
EASTLEIGH RETAILER REQUIREMENTS

Eastleigh Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
KFC	Fastfood/Takeaway	A3/A4/A5	2,550	2,900	237	269
Papa Johns Perfect Pizza	Fastfood/Takeaway	A3/A4/A5	800	2,500	74	232
Pizza Hut	Café/Restaurant/Bar	A3/A4/A5	2,900	3,500	269	325
Subway	Fastfood/Takeaway	A3/A4/A5	600	1,800	56	167
Sub Total			6,850	10,700	636	994
Age Concern	Charity Shops	COMPARISON	600	900	56	84
Between The Lines	Cards/Stationery	COMPARISON	900	1,300	84	121
Edinburgh Woollen Mill	Knitwear	COMPARISON	2,000	2,000	186	186
The Fragrance Shop	Cosmetics/Toiletries	COMPARISON	250	800	23	74
Game	Computers & Software	COMPARISON	1,000	2,000	93	186
Gamestation	Games & Toys	COMPARISON	700	1,200	65	111
O2	Mobile Phones	COMPARISON	300	300	28	28
Pets At Home	Pet Shops	COMPARISON	4,000	12,000	372	1,115
Phones 4U	Mobile Phones	COMPARISON	800	1,500	74	139
Ponden Mill	Furnishing Fabrics	COMPARISON	1,750	5,000	163	465
Powerplay Direct	Video/Hi-Fi/Audio Visual	COMPARISON	1,000	3,000	93	279
Right Price	Household	COMPARISON	1,500	3,000	139	279
The Shaw Trust	Charity Shops	COMPARISON	600	1,000	56	93
Speedy Hire	Tool Hire	COMPARISON	5,000	5,000	465	465
Staples	Furniture	COMPARISON	10,000	12,000	929	1,115
Tile Clearing House	DIY	COMPARISON	4,500	8,000	418	743
TK Maxx	Variety/Discount Stores	COMPARISON	20,000	30,000	1,858	2,787
Vets4Pets	Veterinary	COMPARISON	2,000	2,500	186	232
The Works Publishers	Booksellers	COMPARISON	1,500	2,500	139	232
YMCA	Charity Shops	COMPARISON	750	1,500	70	139
Sub Total			59,150	95,500	5,495	8,872
Aldi	Supermarket	CONVENIENCE	14,600	14,600	1,356	1,356
Bakers Oven	Bakers	CONVENIENCE	1,200	2,500	111	232
Farmfoods	Food	CONVENIENCE	5,000	8,000	465	743
Greggs	Bakers	CONVENIENCE	800	1,200	74	111
Sub Total			21,600	26,300	2,007	2,443
David Lloyd Leisure	Leisure/Sports	LEISURE	5,000	5,000	465	465
Esporta Health & Fitness Clubs	Leisure/Sports	LEISURE	50,000	80,000	4,645	7,432
Sub Total			55,000	85,000	5,110	7,897
TOTAL			142,600	217,500	13,248	20,206

APPENDIX 8
GOAD CATEGORY CENTRE REPORT FOR
FAREHAM

Goad Centre Category Report

(Floorspace sq ft)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	7,600	0.79	0.66	121
Butchers	0	0.00	0.28	0
Confectionery, Tobacco & News	4,700	0.49	0.47	105
Convenience Stores	0	0.00	0.39	0
Fishmongers	1,000	0.10	0.04	259
Frozen Foods	0	0.00	0.62	0
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	1,400	0.15	0.37	40
Health Foods	2,200	0.23	0.21	111
Markets	0	0.00	0.80	0
Off Licences	2,100	0.22	0.30	74
Shoe Repairs & Key Cutting	800	0.08	0.10	83
Supermarkets	21,600	2.26	6.56	34
Total Convenience	41,400	4.33	10.93	40
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	3,500	0.37	0.31	118
Booksellers	5,300	0.55	0.48	116
Carpets & Flooring	3,200	0.33	0.48	70
Catalogue Showrooms	6,900	0.72	0.56	129
Charity Shops	9,900	1.04	0.88	117
Chemist & Drugstores	18,100	1.89	1.28	148
Childrens & Infants Wear	2,900	0.30	0.54	57
Clothing General	51,100	5.34	2.51	213
Crafts, Gifts, China & Glass	5,900	0.62	0.60	102
Cycles & Accessories	1,700	0.18	0.13	142
Department & Variety Stores	76,400	7.99	5.24	152
DIY & Home Improvement	3,500	0.37	1.12	33
Electrical & Other Durable Goods	13,100	1.37	1.18	116
Florists	2,000	0.21	0.25	85
Footwear	8,100	0.85	0.96	88
Furniture Fitted	3,400	0.36	0.25	141
Furniture General	6,800	0.71	1.66	43
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	8,700	0.91	0.64	142
Hardware & Household Goods	42,500	4.45	1.82	244
Jewellery, Watches & Silver	4,900	0.51	0.65	78
Ladies & Mens Wear & Acc.	6,200	0.65	0.59	110
Ladies Wear & Accessories	36,400	3.81	2.58	147
Leather & Travel Goods	1,400	0.15	0.11	134
Mens Wear & Accessories	2,800	0.29	0.71	41
Music & Musical Instruments	3,100	0.32	0.11	293
Music & Video Recordings	6,900	0.72	0.39	184
Newsagents & Stationers	7,400	0.77	0.62	125
Office Supplies	1,400	0.15	0.11	132
Other Comparison Goods	4,300	0.45	0.52	86
Photographic & Optical	2,500	0.26	0.09	275
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	27,900	2.92	1.03	284
Telephones & Accessories	7,900	0.83	0.43	193

Goad Centre Category Report

(Floorspace sq ft)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	4,300	0.45	0.61	73
Toiletries, Cosmetics & Beauty Products	8,500	0.89	0.66	134
Toys, Games & Hobbies	8,000	0.84	0.59	141
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	2,700	0.28	0.25	112
Total Comparison	409,600	42.84	31.93	134
Retail Service				
Clothing & Fancy Dress Hire	1,000	0.10	0.03	387
Dry Cleaners & Launderettes	1,700	0.18	0.30	59
Filling Stations	0	0.00	0.07	0
Health & Beauty	36,000	3.77	2.05	184
Opticians	9,200	0.96	0.63	153
Other Retail Services	3,300	0.35	0.24	142
Photo Processing	0	0.00	0.13	0
Photo Studio	2,000	0.21	0.07	319
Post Offices	5,700	0.60	0.44	137
Repairs, Alterations & Restoration	300	0.03	0.07	47
Travel Agents	8,300	0.87	0.65	134
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	5,900	0.62	0.53	116
Video Tape Rental	2,400	0.25	0.27	94
Total Retail Service	75,800	7.93	5.51	144
Other Retail				
Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0
Total Retail	526,800	55.10		
Service				
Leisure Services				
Bars & Wine Bars	8,600	0.90	1.65	55
Bingo & Amusements	5,100	0.53	0.89	60
Cafes	10,300	1.08	1.02	106
Casinos & Betting Offices	3,600	0.38	0.58	65
Cinemas, Theatres & Concert Halls	16,200	1.69	1.22	138
Clubs	4,300	0.45	1.18	38
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	13,100	1.37	1.77	77
Hotels & Guest Houses	27,700	2.90	1.24	234
Public Houses	19,000	1.99	3.50	57
Restaurants	18,500	1.93	2.52	77
Sports & Leisure Facilities	0	0.00	1.18	0
Total Leisure Services	126,400	13.22	17.12	77
Financial & Business Services				
Building Societies	2,400	0.25	0.37	69
Building Supplies & Services	2,400	0.25	0.48	53
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	2,400	0.25	0.30	84
Financial Services	9,400	0.98	0.79	125
Legal Services	8,000	0.84	0.69	121

Goad Centre Category Report

(Floorspace sq ft)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	0	0.00	0.28	0
Printing & Copying	1,000	0.10	0.19	54
Property Services	17,700	1.85	1.42	130
Retail Banks	31,400	3.28	2.67	123
Total Financial & Business Services	74,700	7.81	7.24	108
Public Services				
Educational Institutions	0	0.00	1.03	0
Emergency Services	12,400	1.30	0.51	257
Government & Municipal Buildings	23,300	2.44	2.48	98
Information & Advice Centres	1,900	0.20	0.36	56
Libraries, Museums & Art Galleries	12,700	1.33	0.95	140
Total Public Services	50,300	5.26	5.32	99
Health & Medical Services				
Medical Services	6,500	0.68	0.75	90
Total Health & Medical Services	6,500	0.68	0.75	90
Religious Services				
Religious Institutions	10,000	1.05	1.79	58
Total Religious Services	10,000	1.05	1.79	58
Transport Services				
Car Parks	70,100	7.33	5.03	146
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	5,800	0.61	0.27	226
Total Transport Services	75,900	7.94	5.36	148
Total Service	343,800	35.96		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.71	0
Total Vacant Non-Retail	0	0.00	0.71	0
Vacant Retail				
Vacant Retail/Service	56,000	5.86	5.48	107
Total Vacant Retail	56,000	5.86	5.48	107
Total Vacant	56,000	5.86		
Commerce				
General Offices				
Offices	24,300	2.54	5.43	47
Sorting Office	0	0.00	0.29	0
Total General Offices	24,300	2.54	5.72	44
Industrial Activities				
Works, Warehouses & Factories	1,800	0.19	1.08	17
Total Industrial Activities	1,800	0.19	1.08	17
Unclassified Building				
Entrance & Stores	3,400	0.36	0.87	41

Goad Centre Category Report

(Floorspace sq ft)



Centre: Fareham
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 14/02/2005

Category		Floorspace sq ft	Area %	Base %	Index
	Total Unclassified Building	3,400	0.36	0.87	41
<hr/>					
Wholesale Trade					
	Wholesalers	0	0.00	0.08	0
	Total Wholesale Trade	0	0.00	0.08	0
<hr/>					
	Total Commerce	29,500	3.09		
<hr/>					
	Centre Total	956,100 sq ft (Ground Floor footprint)			
<hr/>					

Goad Centre Category Report

(Outlet Count)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	5	1.54	1.48	104
Butchers	0	0.00	0.61	0
Confectionery, Tobacco & News	2	0.62	1.18	52
Convenience Stores	0	0.00	0.50	0
Fishmongers	1	0.31	0.11	282
Frozen Foods	0	0.00	0.26	0
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	1	0.31	0.67	46
Health Foods	2	0.62	0.47	133
Markets	0	0.00	0.11	0
Off Licences	2	0.62	0.54	115
Shoe Repairs & Key Cutting	1	0.31	0.41	75
Supermarkets	2	0.62	0.69	89
Total Convenience	16	4.94	7.36	67
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	3	0.93	0.66	140
Booksellers	1	0.31	0.63	49
Carpets & Flooring	1	0.31	0.49	63
Catalogue Showrooms	1	0.31	0.18	173
Charity Shops	9	2.78	1.80	154
Chemist & Drugstores	1	0.31	0.95	32
Childrens & Infants Wear	2	0.62	0.68	91
Clothing General	6	1.85	1.81	102
Crafts, Gifts, China & Glass	6	1.85	1.37	136
Cycles & Accessories	1	0.31	0.20	157
Department & Variety Stores	3	0.93	0.65	143
DIY & Home Improvement	1	0.31	0.68	46
Electrical & Other Durable Goods	8	2.47	1.53	162
Florists	3	0.93	0.76	122
Footwear	4	1.23	1.37	90
Furniture Fitted	2	0.62	0.33	187
Furniture General	3	0.93	1.13	82
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	3	0.93	1.08	86
Hardware & Household Goods	4	1.23	1.22	101
Jewellery, Watches & Silver	5	1.54	1.71	90
Ladies & Mens Wear & Acc.	2	0.62	0.62	99
Ladies Wear & Accessories	15	4.63	3.72	124
Leather & Travel Goods	1	0.31	0.24	131
Mens Wear & Accessories	2	0.62	1.03	60
Music & Musical Instruments	1	0.31	0.20	158
Music & Video Recordings	2	0.62	0.44	141
Newsagents & Stationers	2	0.62	0.55	112
Office Supplies	1	0.31	0.09	359
Other Comparison Goods	3	0.93	0.69	134
Photographic & Optical	2	0.62	0.22	284
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	6	1.85	0.97	191
Telephones & Accessories	8	2.47	0.96	258

Goad Centre Category Report

(Outlet Count)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	3	0.93	0.89	104
Toiletries, Cosmetics & Beauty Products	3	0.93	0.71	130
Toys, Games & Hobbies	6	1.85	0.89	208
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	1	0.31	0.26	117
Total Comparison	125	38.58	32.76	118

Retail Service

Clothing & Fancy Dress Hire	1	0.31	0.06	498
Dry Cleaners & Launderettes	2	0.62	0.78	80
Filling Stations	0	0.00	0.16	0
Health & Beauty	20	6.17	5.04	122
Opticians	7	2.16	1.24	174
Other Retail Services	1	0.31	0.38	82
Photo Processing	0	0.00	0.41	0
Photo Studio	2	0.62	0.15	401
Post Offices	1	0.31	0.31	100
Repairs, Alterations & Restoration	1	0.31	0.21	145
Travel Agents	7	2.16	1.32	164
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	2	0.62	0.45	138
Video Tape Rental	1	0.31	0.33	93
Total Retail Service	45	13.89	10.90	127

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	186	57.41
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Service

Leisure Services

Bars & Wine Bars	2	0.62	1.26	49
Bingo & Amusements	2	0.62	0.50	122
Cafes	7	2.16	2.32	93
Casinos & Betting Offices	2	0.62	0.95	65
Cinemas, Theatres & Concert Halls	1	0.31	0.22	139
Clubs	1	0.31	0.77	40
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	8	2.47	4.05	61
Hotels & Guest Houses	1	0.31	0.43	71
Public Houses	6	1.85	2.92	63
Restaurants	13	4.01	3.54	113
Sports & Leisure Facilities	0	0.00	0.25	0
Total Leisure Services	43	13.27	17.38	76

Financial & Business Services

Building Societies	1	0.31	0.52	59
Building Supplies & Services	2	0.62	0.58	106
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	2	0.62	0.62	100
Financial Services	6	1.85	1.46	126

Goad Centre Category Report

(Outlet Count)



Centre: Fareham
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 14/02/2005

Category	Outlets	Area %	Base %	Index
Legal Services	2	0.62	1.02	60
Other Business Services	0	0.00	0.27	0
Printing & Copying	1	0.31	0.34	92
Property Services	12	3.70	2.85	130
Retail Banks	11	3.40	2.37	143
Total Financial & Business Services	37	11.42	10.08	113
Public Services				
Educational Institutions	0	0.00	0.36	0
Emergency Services	1	0.31	0.14	218
Government & Municipal Buildings	3	0.93	1.02	91
Information & Advice Centres	1	0.31	0.57	54
Libraries, Museums & Art Galleries	2	0.62	0.36	169
Total Public Services	7	2.16	2.46	88
Health & Medical Services				
Medical Services	4	1.23	0.90	137
Total Health & Medical Services	4	1.23	0.90	137
Religious Services				
Religious Institutions	1	0.31	0.68	45
Total Religious Services	1	0.31	0.68	45
Transport Services				
Car Parks	6	1.85	2.40	77
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	2	0.62	0.27	232
Total Transport Services	8	2.47	2.94	84
Total Service	100	30.86		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.41	0
Total Vacant Non-Retail	0	0.00	0.41	0
Vacant Retail				
Vacant Retail/Service	23	7.10	7.91	90
Total Vacant Retail	23	7.10	7.91	90
Total Vacant	23	7.10		
Commerce				
General Offices				
Offices	9	2.78	3.89	71
Sorting Office	0	0.00	0.09	0
Total General Offices	9	2.78	3.98	70
Industrial Activities				
Works, Warehouses & Factories	2	0.62	0.47	131
Total Industrial Activities	2	0.62	0.47	131
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Fareham
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 14/02/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	4	1.23	1.56	79
Total Unclassified Building	4	1.23	1.56	79
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	15	4.63		
<hr/>				
Centre Total	324	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Fareham
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 14/02/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	78	24.07	39.28	61
Between 1,000 and 2,499 square feet	157	48.46	39.51	123
Between 2,500 and 4,999 square feet	51	15.74	12.59	125
Between 5,000 and 9,999 square feet	19	5.86	5.05	116
Between 10,000 and 14,999 square feet	7	2.16	1.48	146
Between 15,000 and 19,999 square feet	4	1.23	0.68	183
Between 20,000 and 29,999 square feet	7	2.16	0.66	325
30,000 square feet and above	1	0.31	0.74	42

APPENDIX 9
FAREHAM RETAILER REQUIREMENTS

Fareham Requirements

Fareham Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
A & W Restaurants	Café/Restaurant/Bar	A3/A4/A5	1,900	2,900	177	269
Cornish Oggy Oggy Pasty Company	Café/Restaurant/Bar	A3/A4/A5	500	2,000	46	186
Long John Silvers	Café/Restaurant/Bar	A3/A4/A5	1,900	2,900	177	269
Pizza Hut	Café/Restaurant/Bar	A3/A4/A5	2,900	3,500	269	325
Pizza Express	Café/Restaurant/Bar	A3/A4/A5	1,750	3,000	163	279
Regent Inns	Public House	A3/A4/A5	6,000	16,000	557	1,486
Subway	Fastfood/takeaway	A3/A4/A5	600	1,800	56	167
Tchibo	Café/Restaurant/Bar	A3/A4/A5	810	810	75	75
Sub Total			16,360	32,910	1,520	2,982
Age Concern	Charity Shops	COMPARISON	600	900	56	84
Barnardos	Charity Shops	COMPARISON	500	1,500	46	139
Between The Lines	Cards/Stationery	COMPARISON	900	1,300	84	121
Bookworld	Booksellers	COMPARISON	1,200	3,000	111	279
Brantano	Shoe Shops	COMPARISON	5,000	7,500	465	697
Cook & Wash	Household	COMPARISON	1,500	4,000	139	372
Deichmann-Shoes	Shoe Shops	COMPARISON	3,000	3,500	279	325
Desire By Debenhams	Woman's Wear	COMPARISON	17,500	22,500	1,626	2,090
Dr China	Medical	COMPARISON	350	1,400	33	130
Edinburgh Woollen Mill	Knitwear	COMPARISON	2,000	2,000	186	186
The Fragrance Shop	Cosmetics/Toiletries	COMPARISON	250	800	23	74
Gamesstation	Games & Toys	COMPARISON	700	1,200	65	111
Herbmedic Chinese Medicine Centre	Medical	COMPARISON	500	1,000	46	93
KA International	Furniture	COMPARISON	500	1,000	46	93
Linens Direct	Household	COMPARISON	2,000	4,000	186	372
Matalan	Clothing/Household	COMPARISON	20,000	40,000	1,858	3,716
Ponden Mill	Furnishing Fabrics	COMPARISON	1,500	3,000	139	279
Priceless Shoes	Shoe Shops	COMPARISON	1,500	2,000	139	186
Scholl	Shoe Shops	COMPARISON	1,400	1,400	130	130
The Shaw Trust	Charity Shops	COMPARISON	600	1,000	56	93
Shoe Zone	Shoe Shops	COMPARISON	1,000	2,500	93	232
Softwide	Computers & Software	COMPARISON	700	1,000	65	93
Stationery Box	Cards/Stationery	COMPARISON	1,500	1,500	139	139
TJ Hughes	Department Stores	COMPARISON	25,000	150,000	2,323	13,935
TK Maxx	Variety/Discount Stores	COMPARISON	20,000	50,000	1,858	4,645
Warren James	Jewellers	COMPARISON	600	1,000	56	93
The Works Publishers	Booksellers	COMPARISON	1,500	2,500	139	232
Zoom The Loom	Household	COMPARISON	1,200	10,000	111	929
Sub Total			113,000	321,500	10,498	29,867
FarmFoods	Food	CONVENIENCE	5,000	8,000	465	743
Greggs	Bakers	CONVENIENCE	800	1,200	74	111
Morris Pasties	Bakers	CONVENIENCE	300	750	28	70
Sub Total			6,100	9,950	567	924
David Lloyd	Leisure/Sports	LEISURE	5,000	5,000	465	465
Esporta Health & Fitness Clubs	Leisure/Sports	LEISURE	50,000	80,000	4,645	7,432
Sub Total			55,000	85,000	5,110	7,897
Hair Express International	Hairdressers	SERVICE	700	900	65	84
Sub Total			700	900	65	84
TOTAL			191,160	450,260	17,759	41,754

APPENDIX 10
GOAD CATEGORY CENTRE REPORT FOR
GOSPORT

Goad Centre Category Report

(Floorspace sq ft)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	5,700	1.36	0.66	207
Butchers	1,200	0.29	0.28	101
Confectionery, Tobacco & News	0	0.00	0.47	0
Convenience Stores	0	0.00	0.39	0
Fishmongers	0	0.00	0.04	0
Frozen Foods	5,200	1.24	0.62	202
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	0	0.00	0.37	0
Health Foods	1,800	0.43	0.21	208
Markets	0	0.00	0.80	0
Off Licences	2,000	0.48	0.30	160
Shoe Repairs & Key Cutting	1,600	0.38	0.10	379
Supermarkets	43,900	10.50	6.56	160
Total Convenience	61,400	14.69	10.93	134
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	0	0.00	0.31	0
Booksellers	1,900	0.45	0.48	95
Carpets & Flooring	0	0.00	0.48	0
Catalogue Showrooms	4,000	0.96	0.56	171
Charity Shops	9,700	2.32	0.88	263
Chemist & Drugstores	3,600	0.86	1.28	67
Childrens & Infants Wear	0	0.00	0.54	0
Clothing General	17,500	4.19	2.51	167
Crafts, Gifts, China & Glass	3,500	0.84	0.60	139
Cycles & Accessories	500	0.12	0.13	95
Department & Variety Stores	16,400	3.92	5.24	75
DIY & Home Improvement	0	0.00	1.12	0
Electrical & Other Durable Goods	9,400	2.25	1.18	190
Florists	400	0.10	0.25	39
Footwear	5,800	1.39	0.96	144
Furniture Fitted	0	0.00	0.25	0
Furniture General	3,100	0.74	1.66	45
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	8,000	1.91	0.64	299
Hardware & Household Goods	5,700	1.36	1.82	75
Jewellery, Watches & Silver	4,000	0.96	0.65	146
Ladies & Mens Wear & Acc.	600	0.14	0.59	24
Ladies Wear & Accessories	18,400	4.40	2.58	170
Leather & Travel Goods	0	0.00	0.11	0
Mens Wear & Accessories	4,500	1.08	0.71	152
Music & Musical Instruments	0	0.00	0.11	0
Music & Video Recordings	1,000	0.24	0.39	61
Newsagents & Stationers	2,900	0.69	0.62	112
Office Supplies	0	0.00	0.11	0
Other Comparison Goods	9,800	2.35	0.52	450
Photographic & Optical	0	0.00	0.09	0
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	1,300	0.31	1.03	30
Telephones & Accessories	2,100	0.50	0.43	118

Goad Centre Category Report

(Floorspace sq ft)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	2,100	0.50	0.61	82
Toiletries, Cosmetics & Beauty Products	3,400	0.81	0.66	122
Toys, Games & Hobbies	0	0.00	0.59	0
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	8,000	1.91	0.25	761
Total Comparison	147,600	35.32	31.93	111

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.03	0
Dry Cleaners & Launderettes	600	0.14	0.30	47
Filling Stations	0	0.00	0.07	0
Health & Beauty	9,700	2.32	2.05	113
Opticians	2,900	0.69	0.63	110
Other Retail Services	0	0.00	0.24	0
Photo Processing	700	0.17	0.13	134
Photo Studio	600	0.14	0.07	219
Post Offices	3,900	0.93	0.44	214
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	8,000	1.91	0.65	296
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	0	0.00	0.53	0
Video Tape Rental	0	0.00	0.27	0
Total Retail Service	26,400	6.32	5.51	115

Other Retail

Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0

Total Retail	235,400	56.33
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Service

Leisure Services

Bars & Wine Bars	1,200	0.29	1.65	17
Bingo & Amusements	4,700	1.12	0.89	126
Cafes	2,200	0.53	1.02	52
Casinos & Betting Offices	3,600	0.86	0.58	148
Cinemas, Theatres & Concert Halls	0	0.00	1.22	0
Clubs	5,000	1.20	1.18	101
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	13,700	3.28	1.77	185
Hotels & Guest Houses	0	0.00	1.24	0
Public Houses	15,400	3.69	3.50	105
Restaurants	4,300	1.03	2.52	41
Sports & Leisure Facilities	0	0.00	1.18	0
Total Leisure Services	50,100	11.99	17.12	70

Financial & Business Services

Building Societies	1,000	0.24	0.37	65
Building Supplies & Services	0	0.00	0.48	0
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	0	0.00	0.30	0
Financial Services	3,700	0.89	0.79	112
Legal Services	900	0.22	0.69	31

Goad Centre Category Report

(Floorspace sq ft)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	0	0.00	0.28	0
Printing & Copying	0	0.00	0.19	0
Property Services	11,700	2.80	1.42	197
Retail Banks	21,900	5.24	2.67	196
Total Financial & Business Services	39,200	9.38	7.24	130
Public Services				
Educational Institutions	1,500	0.36	1.03	35
Emergency Services	11,500	2.75	0.51	545
Government & Municipal Buildings	29,400	7.04	2.48	283
Information & Advice Centres	1,300	0.31	0.36	88
Libraries, Museums & Art Galleries	10,700	2.56	0.95	270
Total Public Services	54,400	13.02	5.32	244
Health & Medical Services				
Medical Services	1,700	0.41	0.75	54
Total Health & Medical Services	1,700	0.41	0.75	54
Religious Services				
Religious Institutions	8,100	1.94	1.79	108
Total Religious Services	8,100	1.94	1.79	108
Transport Services				
Car Parks	0	0.00	5.03	0
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	0	0.00	0.27	0
Total Transport Services	0	0.00	5.36	0
Total Service	153,500	36.73		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.71	0
Total Vacant Non-Retail	0	0.00	0.71	0
Vacant Retail				
Vacant Retail/Service	9,300	2.23	5.48	41
Total Vacant Retail	9,300	2.23	5.48	41
Total Vacant	9,300	2.23		
Commerce				
General Offices				
Offices	16,000	3.83	5.43	71
Sorting Office	0	0.00	0.29	0
Total General Offices	16,000	3.83	5.72	67
Industrial Activities				
Works, Warehouses & Factories	0	0.00	1.08	0
Total Industrial Activities	0	0.00	1.08	0
Unclassified Building				
Entrance & Stores	3,700	0.89	0.87	101

Goad Centre Category Report

(Floorspace sq ft)



Centre: Gosport
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Total Unclassified Building	3,700	0.89	0.87	101
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	19,700	4.71		
<hr/>				
Centre Total	417,900 sq ft (Ground Floor footprint)			

Goad Centre Category Report

(Outlet Count)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	4	2.15	1.48	145
Butchers	1	0.54	0.61	88
Confectionery, Tobacco & News	0	0.00	1.18	0
Convenience Stores	0	0.00	0.50	0
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.54	0.26	204
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	0	0.00	0.67	0
Health Foods	2	1.08	0.47	231
Markets	0	0.00	0.11	0
Off Licences	2	1.08	0.54	200
Shoe Repairs & Key Cutting	3	1.61	0.41	391
Supermarkets	1	0.54	0.69	78
Total Convenience	14	7.53	7.36	102
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	0	0.00	0.66	0
Booksellers	3	1.61	0.63	255
Carpets & Flooring	0	0.00	0.49	0
Catalogue Showrooms	1	0.54	0.18	302
Charity Shops	9	4.84	1.80	268
Chemist & Drugstores	1	0.54	0.95	57
Childrens & Infants Wear	0	0.00	0.68	0
Clothing General	5	2.69	1.81	149
Crafts, Gifts, China & Glass	2	1.08	1.37	79
Cycles & Accessories	1	0.54	0.20	273
Department & Variety Stores	2	1.08	0.65	166
DIY & Home Improvement	0	0.00	0.68	0
Electrical & Other Durable Goods	4	2.15	1.53	141
Florists	1	0.54	0.76	71
Footwear	3	1.61	1.37	118
Furniture Fitted	0	0.00	0.33	0
Furniture General	2	1.08	1.13	95
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	5	2.69	1.08	249
Hardware & Household Goods	3	1.61	1.22	132
Jewellery, Watches & Silver	3	1.61	1.71	94
Ladies & Mens Wear & Acc.	1	0.54	0.62	86
Ladies Wear & Accessories	7	3.76	3.72	101
Leather & Travel Goods	0	0.00	0.24	0
Mens Wear & Accessories	1	0.54	1.03	52
Music & Musical Instruments	0	0.00	0.20	0
Music & Video Recordings	1	0.54	0.44	123
Newsagents & Stationers	3	1.61	0.55	292
Office Supplies	0	0.00	0.09	0
Other Comparison Goods	2	1.08	0.69	155
Photographic & Optical	0	0.00	0.22	0
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	1	0.54	0.97	55
Telephones & Accessories	2	1.08	0.96	112

Goad Centre Category Report

(Outlet Count)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	1	0.54	0.89	61
Toiletries, Cosmetics & Beauty Products	1	0.54	0.71	76
Toys, Games & Hobbies	0	0.00	0.89	0
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	1	0.54	0.26	204
Total Comparison	66	35.48	32.76	108

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.06	0
Dry Cleaners & Launderettes	1	0.54	0.78	69
Filling Stations	0	0.00	0.16	0
Health & Beauty	8	4.30	5.04	85
Opticians	3	1.61	1.24	130
Other Retail Services	0	0.00	0.38	0
Photo Processing	1	0.54	0.41	132
Photo Studio	1	0.54	0.15	349
Post Offices	1	0.54	0.31	173
Repairs, Alterations & Restoration	0	0.00	0.21	0
Travel Agents	5	2.69	1.32	204
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.45	0
Video Tape Rental	0	0.00	0.33	0
Total Retail Service	20	10.75	10.90	99

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	100	53.76
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Service

Leisure Services

Bars & Wine Bars	1	0.54	1.26	43
Bingo & Amusements	3	1.61	0.50	320
Cafes	2	1.08	2.32	46
Casinos & Betting Offices	2	1.08	0.95	113
Cinemas, Theatres & Concert Halls	0	0.00	0.22	0
Clubs	2	1.08	0.77	140
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	8	4.30	4.05	106
Hotels & Guest Houses	0	0.00	0.43	0
Public Houses	6	3.23	2.92	111
Restaurants	5	2.69	3.54	76
Sports & Leisure Facilities	0	0.00	0.25	0
Total Leisure Services	29	15.59	17.38	90

Financial & Business Services

Building Societies	1	0.54	0.52	103
Building Supplies & Services	0	0.00	0.58	0
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	0	0.00	0.62	0
Financial Services	5	2.69	1.46	184

Goad Centre Category Report

(Outlet Count)



Centre: Gosport
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 09/02/2005

Category	Outlets	Area %	Base %	Index
Legal Services	1	0.54	1.02	53
Other Business Services	0	0.00	0.27	0
Printing & Copying	0	0.00	0.34	0
Property Services	11	5.91	2.85	207
Retail Banks	7	3.76	2.37	159
Total Financial & Business Services	25	13.44	10.08	133
Public Services				
Educational Institutions	1	0.54	0.36	149
Emergency Services	1	0.54	0.14	379
Government & Municipal Buildings	4	2.15	1.02	210
Information & Advice Centres	1	0.54	0.57	94
Libraries, Museums & Art Galleries	2	1.08	0.36	295
Total Public Services	9	4.84	2.46	197
Health & Medical Services				
Medical Services	1	0.54	0.90	60
Total Health & Medical Services	1	0.54	0.90	60
Religious Services				
Religious Institutions	1	0.54	0.68	79
Total Religious Services	1	0.54	0.68	79
Transport Services				
Car Parks	8	4.30	2.40	179
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	0	0.00	0.27	0
Total Transport Services	8	4.30	2.94	146
Total Service	73	39.25		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.41	0
Total Vacant Non-Retail	0	0.00	0.41	0
Vacant Retail				
Vacant Retail/Service	4	2.15	7.91	27
Total Vacant Retail	4	2.15	7.91	27
Total Vacant	4	2.15		
Commerce				
General Offices				
Offices	5	2.69	3.89	69
Sorting Office	0	0.00	0.09	0
Total General Offices	5	2.69	3.98	68
Industrial Activities				
Works, Warehouses & Factories	0	0.00	0.47	0
Total Industrial Activities	0	0.00	0.47	0
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Gosport
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/02/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	4	2.15	1.56	138
Total Unclassified Building	4	2.15	1.56	138
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	9	4.84		
<hr/>				
Centre Total	186	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Gosport
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 09/02/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	63	33.87	39.28	86
Between 1,000 and 2,499 square feet	75	40.32	39.51	102
Between 2,500 and 4,999 square feet	33	17.74	12.59	141
Between 5,000 and 9,999 square feet	12	6.45	5.05	128
Between 10,000 and 14,999 square feet	1	0.54	1.48	36
Between 15,000 and 19,999 square feet	0	0.00	0.68	0
Between 20,000 and 29,999 square feet	1	0.54	0.66	81
30,000 square feet and above	1	0.54	0.74	72

APPENDIX 11
GOSPORT RETAILER REQUIREMENTS

Gosport Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
Best Cellars	Public Houses	A3/A4/A5	3,000	3,000	279	279
Papa Johns Perfect Pizza	Fastfood/Takeaway	A3/A4/A5	800	2,500	74	232
Pizza Hut	Café/Restaurant/Bar	A3/A4/A5	850	1,000	79	93
SFI Group	Public Houses	A3/A4/A5	3,000	9,000	279	836
Subway	Fastfood/Takeaway	A3/A4/A5	600	1,800	56	167
Sub Total			8,250	17,300	766	1,607
Age Concern	Charity Shops	COMPARISON	600	900	56	84
Barnardos	Charity Shops	COMPARISON	500	1,500	46	139
Bright House	Electrical	COMPARISON	1,000	2,000	93	186
Claire's Accessories	Fashion Goods	COMPARISON	500	1,000	46	93
Cook & Wash	Homewear	COMPARISON	1,500	4,000	139	372
Matalan	Clothing/Household	COMPARISON	20,000	40,000	1,858	3,716
NCH Children's Services	Charity Shops	COMPARISON	1,000	1,200	93	111
Pets At Home	Pet Shops	COMPARISON	4,000	12,000	372	1,115
Ponden Mill	Furnishing Fabrics	COMPARISON	1,500	3,000	139	279
Right Price	Household	COMPARISON	1,500	3,000	139	279
Savers Health & Beauty	Cosmetics/Toiletries	COMPARISON	2,000	2,500	186	232
Superdrug	Chemists	COMPARISON	1,500	6,000	139	557
Sub Total			35,600	77,100	3,307	7,163
Aldi	Supermarkets	CONVENIENCE	14,600	14,600	1,356	1,356
Farmfoods	Food	CONVENIENCE	5,000	8,000	465	743
Sub Total			19,600	22,600	1,821	2,100
TOTAL			63,450	117,000	5,895	10,869

APPENDIX 12
GOAD CATEGORY CENTRE REPORT FOR
HAVANT

Goad Centre Category Report

(Floorspace sq ft)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	3,600	0.60	0.66	91
Butchers	1,600	0.27	0.28	94
Confectionery, Tobacco & News	5,500	0.92	0.47	196
Convenience Stores	0	0.00	0.39	0
Fishmongers	900	0.15	0.04	371
Frozen Foods	6,000	1.00	0.62	162
Greengrocers	0	0.00	0.14	0
Grocers & Delicatessens	0	0.00	0.37	0
Health Foods	500	0.08	0.21	40
Markets	0	0.00	0.80	0
Off Licences	900	0.15	0.30	50
Shoe Repairs & Key Cutting	0	0.00	0.10	0
Supermarkets	64,700	10.77	6.56	164
Total Convenience	83,700	13.93	10.93	127
Comparison				
Antique Shops	0	0.00	0.22	0
Art & Art Dealers	1,200	0.20	0.31	65
Booksellers	1,500	0.25	0.48	52
Carpets & Flooring	2,500	0.42	0.48	88
Catalogue Showrooms	7,700	1.28	0.56	229
Charity Shops	5,800	0.97	0.88	109
Chemist & Drugstores	13,300	2.21	1.28	172
Childrens & Infants Wear	3,000	0.50	0.54	93
Clothing General	27,200	4.53	2.51	180
Crafts, Gifts, China & Glass	0	0.00	0.60	0
Cycles & Accessories	0	0.00	0.13	0
Department & Variety Stores	0	0.00	5.24	0
DIY & Home Improvement	5,500	0.92	1.12	82
Electrical & Other Durable Goods	5,100	0.85	1.18	72
Florists	1,300	0.22	0.25	88
Footwear	4,600	0.77	0.96	79
Furniture Fitted	0	0.00	0.25	0
Furniture General	11,800	1.96	1.66	118
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	4,600	0.77	0.64	119
Hardware & Household Goods	22,000	3.66	1.82	201
Jewellery, Watches & Silver	3,600	0.60	0.65	92
Ladies & Mens Wear & Acc.	0	0.00	0.59	0
Ladies Wear & Accessories	12,800	2.13	2.58	82
Leather & Travel Goods	0	0.00	0.11	0
Mens Wear & Accessories	500	0.08	0.71	12
Music & Musical Instruments	0	0.00	0.11	0
Music & Video Recordings	0	0.00	0.39	0
Newsagents & Stationers	6,300	1.05	0.62	170
Office Supplies	0	0.00	0.11	0
Other Comparison Goods	7,200	1.20	0.52	230
Photographic & Optical	0	0.00	0.09	0
Secondhand Goods, Books, etc.	1,000	0.17	0.11	146
Sports, Camping & Leisure Goods	6,600	1.10	1.03	107
Telephones & Accessories	900	0.15	0.43	35

Goad Centre Category Report

(Floorspace sq ft)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	2,300	0.38	0.61	62
Toiletries, Cosmetics & Beauty Products	10,500	1.75	0.66	263
Toys, Games & Hobbies	2,700	0.45	0.59	76
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	6,800	1.13	0.25	450
Total Comparison	178,300	29.67	31.93	93

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.03	0
Dry Cleaners & Launderettes	1,700	0.28	0.30	93
Filling Stations	1,300	0.22	0.07	320
Health & Beauty	11,900	1.98	2.05	97
Opticians	5,700	0.95	0.63	151
Other Retail Services	3,300	0.55	0.24	226
Photo Processing	0	0.00	0.13	0
Photo Studio	2,700	0.45	0.07	686
Post Offices	0	0.00	0.44	0
Repairs, Alterations & Restoration	500	0.08	0.07	124
Travel Agents	5,200	0.87	0.65	134
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	4,400	0.73	0.53	137
Video Tape Rental	0	0.00	0.27	0
Total Retail Service	36,700	6.11	5.51	111

Other Retail

Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0

Total Retail	298,700	49.71
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Service

Leisure Services

Bars & Wine Bars	0	0.00	1.65	0
Bingo & Amusements	6,600	1.10	0.89	123
Cafes	3,900	0.65	1.02	64
Casinos & Betting Offices	3,800	0.63	0.58	109
Cinemas, Theatres & Concert Halls	0	0.00	1.22	0
Clubs	3,800	0.63	1.18	53
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	12,400	2.06	1.77	116
Hotels & Guest Houses	12,100	2.01	1.24	163
Public Houses	18,700	3.11	3.50	89
Restaurants	8,000	1.33	2.52	53
Sports & Leisure Facilities	0	0.00	1.18	0
Total Leisure Services	69,300	11.53	17.12	67

Financial & Business Services

Building Societies	1,200	0.20	0.37	55
Building Supplies & Services	5,100	0.85	0.48	179
Business Goods & Services	1,000	0.17	0.06	289
Employment & Careers	6,200	1.03	0.30	345
Financial Services	6,800	1.13	0.79	143
Legal Services	4,300	0.72	0.69	104

Goad Centre Category Report

(Floorspace sq ft)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	800	0.13	0.28	48
Printing & Copying	0	0.00	0.19	0
Property Services	9,700	1.61	1.42	114
Retail Banks	17,200	2.86	2.67	107
Total Financial & Business Services	52,300	8.70	7.24	120
Public Services				
Educational Institutions	0	0.00	1.03	0
Emergency Services	0	0.00	0.51	0
Government & Municipal Buildings	1,000	0.17	2.48	7
Information & Advice Centres	4,000	0.67	0.36	187
Libraries, Museums & Art Galleries	9,800	1.63	0.95	172
Total Public Services	14,800	2.46	5.32	46
Health & Medical Services				
Medical Services	5,500	0.92	0.75	122
Total Health & Medical Services	5,500	0.92	0.75	122
Religious Services				
Religious Institutions	10,600	1.76	1.79	99
Total Religious Services	10,600	1.76	1.79	99
Transport Services				
Car Parks	62,400	10.38	5.03	207
Taxis & Mini-cabs	1,600	0.27	0.07	398
Transport Facilities	3,400	0.57	0.27	211
Total Transport Services	67,400	11.22	5.36	209
Total Service	219,900	36.60		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.71	0
Total Vacant Non-Retail	0	0.00	0.71	0
Vacant Retail				
Vacant Retail/Service	39,400	6.56	5.48	120
Total Vacant Retail	39,400	6.56	5.48	120
Total Vacant	39,400	6.56		
Commerce				
General Offices				
Offices	29,200	4.86	5.43	90
Sorting Office	9,500	1.58	0.29	541
Total General Offices	38,700	6.44	5.72	113
Industrial Activities				
Works, Warehouses & Factories	1,400	0.23	1.08	22
Total Industrial Activities	1,400	0.23	1.08	22
Unclassified Building				
Entrance & Stores	2,800	0.47	0.87	53

Goad Centre Category Report

(Floorspace sq ft)



Centre: Havant
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 12/01/2005

Category	Floorspace sq ft	Area %	Base %	Index
Total Unclassified Building	2,800	0.47	0.87	53
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	42,900	7.14		
<hr/>				
Centre Total	600,900 sq ft (Ground Floor footprint)			

Goad Centre Category Report

(Outlet Count)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	4	1.49	1.48	101
Butchers	1	0.37	0.61	61
Confectionery, Tobacco & News	3	1.12	1.18	95
Convenience Stores	0	0.00	0.50	0
Fishmongers	1	0.37	0.11	341
Frozen Foods	1	0.37	0.26	142
Greengrocers	0	0.00	0.32	0
Grocers & Delicatessens	0	0.00	0.67	0
Health Foods	1	0.37	0.47	80
Markets	0	0.00	0.11	0
Off Licences	1	0.37	0.54	69
Shoe Repairs & Key Cutting	0	0.00	0.41	0
Supermarkets	2	0.75	0.69	108
Total Convenience	14	5.22	7.36	71
Comparison				
Antique Shops	0	0.00	0.47	0
Art & Art Dealers	2	0.75	0.66	113
Booksellers	1	0.37	0.63	59
Carpets & Flooring	2	0.75	0.49	153
Catalogue Showrooms	1	0.37	0.18	210
Charity Shops	6	2.24	1.80	124
Chemist & Drugstores	2	0.75	0.95	79
Childrens & Infants Wear	2	0.75	0.68	110
Clothing General	4	1.49	1.81	83
Crafts, Gifts, China & Glass	0	0.00	1.37	0
Cycles & Accessories	0	0.00	0.20	0
Department & Variety Stores	0	0.00	0.65	0
DIY & Home Improvement	3	1.12	0.68	165
Electrical & Other Durable Goods	5	1.87	1.53	122
Florists	3	1.12	0.76	147
Footwear	3	1.12	1.37	82
Furniture Fitted	0	0.00	0.33	0
Furniture General	3	1.12	1.13	99
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	3	1.12	1.08	104
Hardware & Household Goods	3	1.12	1.22	92
Jewellery, Watches & Silver	3	1.12	1.71	66
Ladies & Mens Wear & Acc.	0	0.00	0.62	0
Ladies Wear & Accessories	7	2.61	3.72	70
Leather & Travel Goods	0	0.00	0.24	0
Mens Wear & Accessories	1	0.37	1.03	36
Music & Musical Instruments	0	0.00	0.20	0
Music & Video Recordings	0	0.00	0.44	0
Newsagents & Stationers	2	0.75	0.55	135
Office Supplies	0	0.00	0.09	0
Other Comparison Goods	5	1.87	0.69	270
Photographic & Optical	0	0.00	0.22	0
Secondhand Goods, Books, etc.	1	0.37	0.25	147
Sports, Camping & Leisure Goods	2	0.75	0.97	77
Telephones & Accessories	1	0.37	0.96	39

Goad Centre Category Report

(Outlet Count)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	2	0.75	0.89	84
Toiletries, Cosmetics & Beauty Products	2	0.75	0.71	105
Toys, Games & Hobbies	3	1.12	0.89	126
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	3	1.12	0.26	425
Total Comparison	75	27.99	32.76	85

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.06	0
Dry Cleaners & Launderettes	2	0.75	0.78	96
Filling Stations	1	0.37	0.16	238
Health & Beauty	14	5.22	5.04	104
Opticians	4	1.49	1.24	120
Other Retail Services	1	0.37	0.38	99
Photo Processing	0	0.00	0.41	0
Photo Studio	2	0.75	0.15	485
Post Offices	0	0.00	0.31	0
Repairs, Alterations & Restoration	2	0.75	0.21	352
Travel Agents	5	1.87	1.32	141
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	1	0.37	0.45	84
Video Tape Rental	0	0.00	0.33	0
Total Retail Service	32	11.94	10.90	110

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	121	45.15
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Service

Leisure Services

Bars & Wine Bars	0	0.00	1.26	0
Bingo & Amusements	3	1.12	0.50	222
Cafes	4	1.49	2.32	64
Casinos & Betting Offices	3	1.12	0.95	118
Cinemas, Theatres & Concert Halls	0	0.00	0.22	0
Clubs	2	0.75	0.77	97
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	7	2.61	4.05	64
Hotels & Guest Houses	1	0.37	0.43	86
Public Houses	8	2.99	2.92	102
Restaurants	7	2.61	3.54	74
Sports & Leisure Facilities	0	0.00	0.25	0
Total Leisure Services	35	13.06	17.38	75

Financial & Business Services

Building Societies	1	0.37	0.52	71
Building Supplies & Services	4	1.49	0.58	255
Business Goods & Services	1	0.37	0.03	1,078
Employment & Careers	7	2.61	0.62	424
Financial Services	5	1.87	1.46	127

Goad Centre Category Report

(Outlet Count)



Centre: Havant
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 12/01/2005

Category	Outlets	Area %	Base %	Index
Legal Services	4	1.49	1.02	146
Other Business Services	1	0.37	0.27	140
Printing & Copying	0	0.00	0.34	0
Property Services	8	2.99	2.85	105
Retail Banks	7	2.61	2.37	110
Total Financial & Business Services	38	14.18	10.08	141
Public Services				
Educational Institutions	0	0.00	0.36	0
Emergency Services	0	0.00	0.14	0
Government & Municipal Buildings	1	0.37	1.02	37
Information & Advice Centres	4	1.49	0.57	260
Libraries, Museums & Art Galleries	1	0.37	0.36	102
Total Public Services	6	2.24	2.46	91
Health & Medical Services				
Medical Services	4	1.49	0.90	166
Total Health & Medical Services	4	1.49	0.90	166
Religious Services				
Religious Institutions	2	0.75	0.68	109
Total Religious Services	2	0.75	0.68	109
Transport Services				
Car Parks	9	3.36	2.40	140
Taxis & Mini-cabs	3	1.12	0.27	411
Transport Facilities	2	0.75	0.27	280
Total Transport Services	14	5.22	2.94	177
Total Service	99	36.94		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.41	0
Total Vacant Non-Retail	0	0.00	0.41	0
Vacant Retail				
Vacant Retail/Service	23	8.58	7.91	109
Total Vacant Retail	23	8.58	7.91	109
Total Vacant	23	8.58		
Commerce				
General Offices				
Offices	18	6.72	3.89	173
Sorting Office	1	0.37	0.09	411
Total General Offices	19	7.09	3.98	178
Industrial Activities				
Works, Warehouses & Factories	2	0.75	0.47	159
Total Industrial Activities	2	0.75	0.47	159
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Havant
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 12/01/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	4	1.49	1.56	95
Total Unclassified Building	4	1.49	1.56	95
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	25	9.33		
<hr/>				
Centre Total	268	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Havant
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 12/01/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	115	42.91	39.28	109
Between 1,000 and 2,499 square feet	98	36.57	39.51	93
Between 2,500 and 4,999 square feet	33	12.31	12.59	98
Between 5,000 and 9,999 square feet	13	4.85	5.05	96
Between 10,000 and 14,999 square feet	2	0.75	1.48	50
Between 15,000 and 19,999 square feet	3	1.12	0.68	166
Between 20,000 and 29,999 square feet	3	1.12	0.66	169
30,000 square feet and above	1	0.37	0.74	50

APPENDIX 13
HAVANT RETAILER REQUIREMENTS

Havant Requirements

Company	Retail Specialities	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
Caffe Nero	Café	A3/A4/A5	800	1,500	74	139
KFC	Fast Food/Takeaway	A3/A4/A5	1,750	5,000	163	465
Pizza Hut	Restaurant	A3/A4/A5	2,900	3,500	269	325
Pizza Express	Restaurant	A3/A4/A5	1,750	3,000	163	279
SFI Group	Public Houses	A3/A4/A5	3,000	9,000	279	836
Subway	Fast Food/Takeaway	A3/A4/A5	600	1,800	56	167
Sub Total			10,800	23,800	1,003	2,211
99p Stores	Discount Stores	COMPARISON	3,000	10,000	279	929
Age Concern	Charity Shops	COMPARISON	600	900	56	84
Barnardos	Charity Shops	COMPARISON	500	1,500	46	139
Bon Marche	Woman's Wear	COMPARISON	2,500	3,500	232	325
The Carphone Warehouse	Mobile Phones	COMPARISON	500	1,000	46	93
Cook & Wash	Homeware	COMPARISON	1,500	4,000	139	372
Desire By Debenhams	Women's wear	COMPARISON	17,500	22,500	1,626	2,090
Dignity Furnerals	Funeral Directors	COMPARISON	900	1,500	84	139
Formula One Auto Centres	Vehicular	COMPARISON	2,500	10,000	232	929
Halfords	Motor Accessories	COMPARISON	4,000	10,000	372	929
Linens Direct	Household	COMPARISON	2,000	4,000	186	372
Pets At Home	Pet Shops	COMPARISON	4,000	12,000	372	1,115
Priceless Shoes	Shoe Shops	COMPARISON	1,500	2,000	139	186
The Shaw Trust	Charity Shops	COMPARISON	600	1,000	56	93
Tile Clearing House	DIY	COMPARISON	4,500	8,000	418	743
Topps Tiles	Floor Covering	COMPARISON	4,000	8,000	372	743
Sub Total			50,100	99,900	4,654	9,281

Aldi	Supermarkets	CONVENIENCE	14,600	14,600	1,356	1,356
Farmfoods	Food	CONVENIENCE	5,000	8,000	465	743
Greggs	Bakers	CONVENIENCE	800	1,200	74	111
Holland & Barrett	Health Foods	CONVENIENCE	1,000	1,500	93	139
Sub Total			21,400	25,300	1,988	2,350
David Lloyd	Leisure/Sports	LEISURE	5,000	5,000	465	465
Esporta Health & Fitness Clubs	Leisure/Sports	LEISURE	50,000	80,000	4,645	7,432
Sub Total			55,000	85,000	5,110	7,897
Saks Hair	Hairdressers	SERVICE	1,000	1,000	93	93
Sub Total			1,000	1,000	93	93
TOTAL			138,300	235,000	12,848	21,832

APPENDIX 14
GOAD CATEGORY CENTRE REPORT FOR
SOUTHSEA

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	7,900	1.82	0.66	277
Butchers	1,100	0.25	0.28	90
Confectionery, Tobacco & News	0	0.00	0.47	0
Convenience Stores	6,200	1.43	0.39	368
Fishmongers	0	0.00	0.04	0
Frozen Foods	4,800	1.11	0.62	180
Greengrocers	800	0.18	0.14	132
Grocers & Delicatessens	2,900	0.67	0.37	182
Health Foods	1,300	0.30	0.21	145
Markets	0	0.00	0.80	0
Off Licences	2,200	0.51	0.30	170
Shoe Repairs & Key Cutting	0	0.00	0.10	0
Supermarkets	18,600	4.29	6.56	65
Total Convenience	45,800	10.57	10.93	97
Comparison				
Antique Shops	4,900	1.13	0.22	506
Art & Art Dealers	0	0.00	0.31	0
Booksellers	0	0.00	0.48	0
Carpets & Flooring	800	0.18	0.48	39
Catalogue Showrooms	0	0.00	0.56	0
Charity Shops	8,500	1.96	0.88	222
Chemist & Drugstores	6,700	1.55	1.28	121
Childrens & Infants Wear	0	0.00	0.54	0
Clothing General	6,800	1.57	2.51	63
Crafts, Gifts, China & Glass	1,500	0.35	0.60	57
Cycles & Accessories	0	0.00	0.13	0
Department & Variety Stores	77,500	17.89	5.24	341
DIY & Home Improvement	9,300	2.15	1.12	191
Electrical & Other Durable Goods	1,200	0.28	1.18	23
Florists	1,300	0.30	0.25	122
Footwear	1,900	0.44	0.96	45
Furniture Fitted	0	0.00	0.25	0
Furniture General	3,300	0.76	1.66	46
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	3,300	0.76	0.64	119
Hardware & Household Goods	1,000	0.23	1.82	13
Jewellery, Watches & Silver	4,100	0.95	0.65	145
Ladies & Mens Wear & Acc.	1,100	0.25	0.59	43
Ladies Wear & Accessories	12,100	2.79	2.58	108
Leather & Travel Goods	0	0.00	0.11	0
Mens Wear & Accessories	1,500	0.35	0.71	49
Music & Musical Instruments	0	0.00	0.11	0
Music & Video Recordings	0	0.00	0.39	0
Newsagents & Stationers	3,100	0.72	0.62	116
Office Supplies	0	0.00	0.11	0
Other Comparison Goods	0	0.00	0.52	0
Photographic & Optical	0	0.00	0.09	0
Secondhand Goods, Books, etc.	0	0.00	0.11	0
Sports, Camping & Leisure Goods	0	0.00	1.03	0
Telephones & Accessories	600	0.14	0.43	32

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Textiles & Soft Furnishings	0	0.00	0.61	0
Toiletries, Cosmetics & Beauty Products	5,100	1.18	0.66	177
Toys, Games & Hobbies	2,200	0.51	0.59	86
Vehicle & Motorcycle Sales	0	0.00	0.57	0
Vehicle Accessories	1,600	0.37	0.25	147
Total Comparison	159,400	36.80	31.93	115

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.03	0
Dry Cleaners & Launderettes	1,900	0.44	0.30	145
Filling Stations	0	0.00	0.07	0
Health & Beauty	16,300	3.76	2.05	183
Opticians	4,300	0.99	0.63	158
Other Retail Services	0	0.00	0.24	0
Photo Processing	0	0.00	0.13	0
Photo Studio	500	0.12	0.07	176
Post Offices	0	0.00	0.44	0
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	5,200	1.20	0.65	186
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.04	0
Vehicle Repairs & Services	0	0.00	0.53	0
Video Tape Rental	1,000	0.23	0.27	86
Total Retail Service	29,200	6.74	5.51	122

Other Retail

Other Retail Outlets	0	0.00	0.10	0
Total Other Retail	0	0.00	0.10	0

Total Retail	234,400	54.12
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Service

Leisure Services

Bars & Wine Bars	12,500	2.89	1.65	175
Bingo & Amusements	0	0.00	0.89	0
Cafes	1,900	0.44	1.02	43
Casinos & Betting Offices	13,100	3.02	0.58	519
Cinemas, Theatres & Concert Halls	0	0.00	1.22	0
Clubs	0	0.00	1.18	0
Disco, Dance & Nightclubs	0	0.00	0.35	0
Fast Food & Take Away	7,600	1.75	1.77	99
Hotels & Guest Houses	0	0.00	1.24	0
Public Houses	21,800	5.03	3.50	144
Restaurants	44,800	10.34	2.52	410
Sports & Leisure Facilities	0	0.00	1.18	0
Total Leisure Services	101,700	23.48	17.12	137

Financial & Business Services

Building Societies	2,200	0.51	0.37	139
Building Supplies & Services	2,700	0.62	0.48	131
Business Goods & Services	0	0.00	0.06	0
Employment & Careers	1,100	0.25	0.30	85
Financial Services	3,200	0.74	0.79	94
Legal Services	0	0.00	0.69	0

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Floorspace sq ft	Area %	Base %	Index
Other Business Services	0	0.00	0.28	0
Printing & Copying	0	0.00	0.19	0
Property Services	33,500	7.73	1.42	545
Retail Banks	8,700	2.01	2.67	75
Total Financial & Business Services	51,400	11.87	7.24	164
Public Services				
Educational Institutions	0	0.00	1.03	0
Emergency Services	0	0.00	0.51	0
Government & Municipal Buildings	2,800	0.65	2.48	26
Information & Advice Centres	0	0.00	0.36	0
Libraries, Museums & Art Galleries	1,500	0.35	0.95	36
Total Public Services	4,300	0.99	5.32	19
Health & Medical Services				
Medical Services	2,600	0.60	0.75	80
Total Health & Medical Services	2,600	0.60	0.75	80
Religious Services				
Religious Institutions	0	0.00	1.79	0
Total Religious Services	0	0.00	1.79	0
Transport Services				
Car Parks	18,100	4.18	5.03	83
Taxis & Mini-cabs	0	0.00	0.07	0
Transport Facilities	0	0.00	0.27	0
Total Transport Services	18,100	4.18	5.36	78
Total Service	178,100	41.12		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.71	0
Total Vacant Non-Retail	0	0.00	0.71	0
Vacant Retail				
Vacant Retail/Service	17,800	4.11	5.48	75
Total Vacant Retail	17,800	4.11	5.48	75
Total Vacant	17,800	4.11		
Commerce				
General Offices				
Offices	2,400	0.55	5.43	10
Sorting Office	0	0.00	0.29	0
Total General Offices	2,400	0.55	5.72	10
Industrial Activities				
Works, Warehouses & Factories	0	0.00	1.08	0
Total Industrial Activities	0	0.00	1.08	0
Unclassified Building				
Entrance & Stores	400	0.09	0.87	11

Goad Centre Category Report

(Floorspace sq ft)



Centre: Southsea
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 21/02/2005

Category		Floorspace sq ft	Area %	Base %	Index
	Total Unclassified Building	400	0.09	0.87	11
<hr/>					
Wholesale Trade					
	Wholesalers	0	0.00	0.08	0
	Total Wholesale Trade	0	0.00	0.08	0
<hr/>					
	Total Commerce	2,800	0.65		
<hr/>					
	Centre Total	433,100 sq ft (Ground Floor footprint)			
<hr/>					

Goad Centre Category Report

(Outlet Count)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Outlets	Area %	Base %	Index
Retail				
Convenience				
Bakers & Confectioners	5	2.53	1.48	171
Butchers	1	0.51	0.61	83
Confectionery, Tobacco & News	0	0.00	1.18	0
Convenience Stores	3	1.52	0.50	301
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.51	0.26	192
Greengrocers	1	0.51	0.32	157
Grocers & Delicatessens	2	1.01	0.67	150
Health Foods	1	0.51	0.47	109
Markets	0	0.00	0.11	0
Off Licences	2	1.01	0.54	187
Shoe Repairs & Key Cutting	0	0.00	0.41	0
Supermarkets	1	0.51	0.69	73
Total Convenience	17	8.59	7.36	117
Comparison				
Antique Shops	2	1.01	0.47	215
Art & Art Dealers	0	0.00	0.66	0
Booksellers	0	0.00	0.63	0
Carpets & Flooring	1	0.51	0.49	103
Catalogue Showrooms	0	0.00	0.18	0
Charity Shops	6	3.03	1.80	168
Chemist & Drugstores	2	1.01	0.95	106
Childrens & Infants Wear	0	0.00	0.68	0
Clothing General	4	2.02	1.81	112
Crafts, Gifts, China & Glass	2	1.01	1.37	74
Cycles & Accessories	0	0.00	0.20	0
Department & Variety Stores	3	1.52	0.65	234
DIY & Home Improvement	3	1.52	0.68	224
Electrical & Other Durable Goods	2	1.01	1.53	66
Florists	2	1.01	0.76	133
Footwear	1	0.51	1.37	37
Furniture Fitted	0	0.00	0.33	0
Furniture General	2	1.01	1.13	89
Gardens & Equipment	0	0.00	0.06	0
Greeting Cards	2	1.01	1.08	93
Hardware & Household Goods	1	0.51	1.22	41
Jewellery, Watches & Silver	4	2.02	1.71	118
Ladies & Mens Wear & Acc.	1	0.51	0.62	81
Ladies Wear & Accessories	7	3.54	3.72	95
Leather & Travel Goods	0	0.00	0.24	0
Mens Wear & Accessories	1	0.51	1.03	49
Music & Musical Instruments	0	0.00	0.20	0
Music & Video Recordings	0	0.00	0.44	0
Newsagents & Stationers	1	0.51	0.55	92
Office Supplies	0	0.00	0.09	0
Other Comparison Goods	0	0.00	0.69	0
Photographic & Optical	0	0.00	0.22	0
Secondhand Goods, Books, etc.	0	0.00	0.25	0
Sports, Camping & Leisure Goods	0	0.00	0.97	0
Telephones & Accessories	1	0.51	0.96	53

Goad Centre Category Report

(Outlet Count)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Outlets	Area %	Base %	Index
Textiles & Soft Furnishings	0	0.00	0.89	0
Toiletries, Cosmetics & Beauty Products	1	0.51	0.71	71
Toys, Games & Hobbies	2	1.01	0.89	113
Vehicle & Motorcycle Sales	0	0.00	0.29	0
Vehicle Accessories	1	0.51	0.26	192
Total Comparison	52	26.26	32.76	80

Retail Service

Clothing & Fancy Dress Hire	0	0.00	0.06	0
Dry Cleaners & Launderettes	2	1.01	0.78	130
Filling Stations	0	0.00	0.16	0
Health & Beauty	13	6.57	5.04	130
Opticians	3	1.52	1.24	122
Other Retail Services	0	0.00	0.38	0
Photo Processing	0	0.00	0.41	0
Photo Studio	1	0.51	0.15	328
Post Offices	0	0.00	0.31	0
Repairs, Alterations & Restoration	0	0.00	0.21	0
Travel Agents	4	2.02	1.32	153
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.45	0
Video Tape Rental	1	0.51	0.33	152
Total Retail Service	24	12.12	10.90	111

Other Retail

Other Retail Outlets	0	0.00	0.13	0
Total Other Retail	0	0.00	0.13	0

Total Retail	93	46.97		
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Service

Leisure Services

Bars & Wine Bars	3	1.52	1.26	120
Bingo & Amusements	0	0.00	0.50	0
Cafes	2	1.01	2.32	43
Casinos & Betting Offices	3	1.52	0.95	159
Cinemas, Theatres & Concert Halls	0	0.00	0.22	0
Clubs	0	0.00	0.77	0
Disco, Dance & Nightclubs	0	0.00	0.15	0
Fast Food & Take Away	4	2.02	4.05	50
Hotels & Guest Houses	0	0.00	0.43	0
Public Houses	6	3.03	2.92	104
Restaurants	26	13.13	3.54	371
Sports & Leisure Facilities	0	0.00	0.25	0
Total Leisure Services	44	22.22	17.38	128

Financial & Business Services

Building Societies	1	0.51	0.52	96
Building Supplies & Services	1	0.51	0.58	86
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	1	0.51	0.62	82
Financial Services	3	1.52	1.46	103

Goad Centre Category Report

(Outlet Count)



Centre: Southsea
 Base: All UK Centres
 Centre Selection: All Outlets
 Survey Date: 21/02/2005

Category	Outlets	Area %	Base %	Index
Legal Services	0	0.00	1.02	0
Other Business Services	0	0.00	0.27	0
Printing & Copying	0	0.00	0.34	0
Property Services	23	11.62	2.85	407
Retail Banks	5	2.53	2.37	106
Total Financial & Business Services	34	17.17	10.08	170
Public Services				
Educational Institutions	0	0.00	0.36	0
Emergency Services	0	0.00	0.14	0
Government & Municipal Buildings	1	0.51	1.02	49
Information & Advice Centres	0	0.00	0.57	0
Libraries, Museums & Art Galleries	1	0.51	0.36	138
Total Public Services	2	1.01	2.46	41
Health & Medical Services				
Medical Services	1	0.51	0.90	56
Total Health & Medical Services	1	0.51	0.90	56
Religious Services				
Religious Institutions	0	0.00	0.68	0
Total Religious Services	0	0.00	0.68	0
Transport Services				
Car Parks	4	2.02	2.40	84
Taxis & Mini-cabs	0	0.00	0.27	0
Transport Facilities	0	0.00	0.27	0
Total Transport Services	4	2.02	2.94	69
Total Service	85	42.93		
Vacant				
Vacant Non-Retail				
Vacant Other Buildings	0	0.00	0.41	0
Total Vacant Non-Retail	0	0.00	0.41	0
Vacant Retail				
Vacant Retail/Service	16	8.08	7.91	102
Total Vacant Retail	16	8.08	7.91	102
Total Vacant	16	8.08		
Commerce				
General Offices				
Offices	3	1.52	3.89	39
Sorting Office	0	0.00	0.09	0
Total General Offices	3	1.52	3.98	38
Industrial Activities				
Works, Warehouses & Factories	0	0.00	0.47	0
Total Industrial Activities	0	0.00	0.47	0
Unclassified Building				

Goad Centre Category Report

(Outlet Count)



Centre: Southsea
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 21/02/2005

Category	Outlets	Area %	Base %	Index
Entrance & Stores	1	0.51	1.56	32
Total Unclassified Building	1	0.51	1.56	32
<hr/>				
Wholesale Trade				
Wholesalers	0	0.00	0.08	0
Total Wholesale Trade	0	0.00	0.08	0
<hr/>				
Total Commerce	4	2.02		
<hr/>				
Centre Total	198	Outlets		

Goad Centre Category Report

(Outlet Count)



Centre: Southsea
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 21/02/2005

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	44	22.22	39.28	57
Between 1,000 and 2,499 square feet	117	59.09	39.51	150
Between 2,500 and 4,999 square feet	25	12.63	12.59	100
Between 5,000 and 9,999 square feet	8	4.04	5.05	80
Between 10,000 and 14,999 square feet	0	0.00	1.48	0
Between 15,000 and 19,999 square feet	2	1.01	0.68	149
Between 20,000 and 29,999 square feet	1	0.51	0.66	76
30,000 square feet and above	1	0.51	0.74	68

APPENDIX 15
SOUTHSEA RETAILER REQUIREMENTS

Southsea Requirements

Company	Retail Speciality	Type	Min (sq ft)	Max (sq ft)	Min (sq m)	Max (sq m)
Baracuda Group	Public Houses	A3/A4/A5	4,000	5,000	372	465
Smith & Jones	Public Houses	A3/A4/A5	4,000	5,000	372	465
Varsity	Café/Restaurant/Bar	A3/A4/A5	4,000	5,000	372	465
Sub Total			12,000	15,000	1,115	1,394
Argos	Variety Stores	COMPARISON	10,000	16,000	929	1,486
Edinburgh Woollen Mill	Knitwear	COMPARISON	2,000	2,000	186	186
Millets	Sports & Leisure Wear	COMPARISON	1,500	2,500	139	232
Savers	Cosmetics/Toiletries	COMPARISON	2,000	2,500	186	232
The Works Publishers	Booksellers	COMPARISON	1,500	2,500	139	232
Sub Total			17,000	25,500	1,579	2,369
Greggs	Bakers	CONVIENENCE	800	1,200	74	111
Sub Total			800	1,200	74	111
TOTAL			29,800	41,700	2,768	3,874

APPENDIX 16
ASSESSMENT OF CACI PARTICIPATION
PROFILES BY DISTRICT

Assessment of CACI Participation Profiles by District

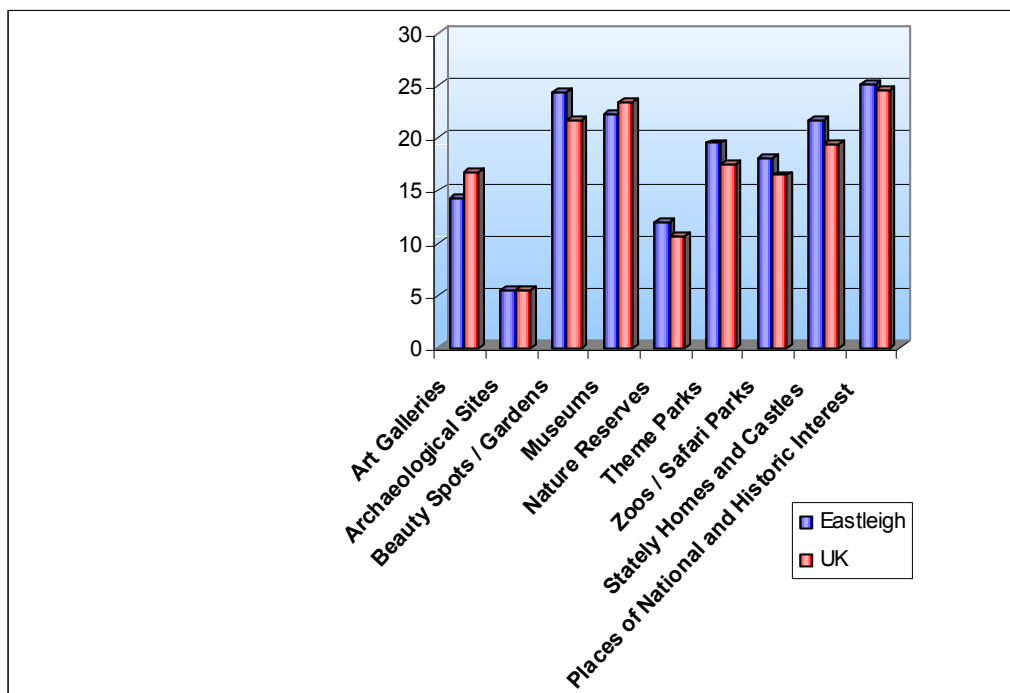
1.01 The following section draws on CACI Participation Profile reports for all of the PUSH districts.

Eastleigh

1.02 In Eastleigh, the CACI Participation Profile on performances shows that going to the cinema is the most popular performance activity, which is also slightly above the Great Britain average. Eastleigh has a below average participation rate for visits to the theatre and visits to classical music concerts.

1.03 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Eastleigh, **Figure 1** shows that visits to beauty spots/gardens, nature reserves, theme parks, zoos/safaris parks, stately homes and castles and places of national and historic interest exceed the national average. This reflect the fact that a higher than average proportion of people in Eastleigh are members of the National Trust and English Heritage. Eastleigh has a below average number of visits to art galleries and museums.

Figure 1: Outings over the last 12 months



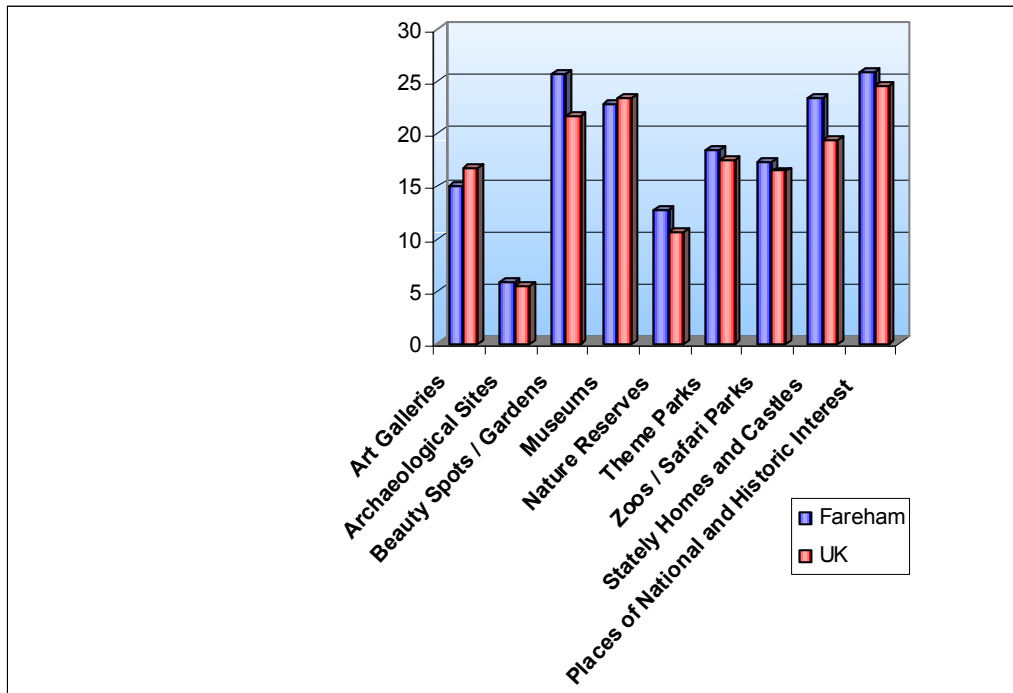
Source: CACI- Eastleigh Participation Profile (Sport & Leisure)

Fareham

1.04 In Fareham, the CACI Participation Profile on performances shows that going to the cinema is the most popular performance activity. Fareham also has a below average participation rate for visits to the theatre and visits to classical music concerts, the opera and jazz concerts.

1.05 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Fareham, Figure X shows that visits to beauty spots/gardens, theme parks, zoos/safaris parks, stately homes and castles and places of national and historic interest exceed the national average. There is also a higher than average proportion of people who are members of the National Trust and English Heritage. Fareham has a below average number of visits to art galleries and museums.

Figure 2: Outings over the last 12 months



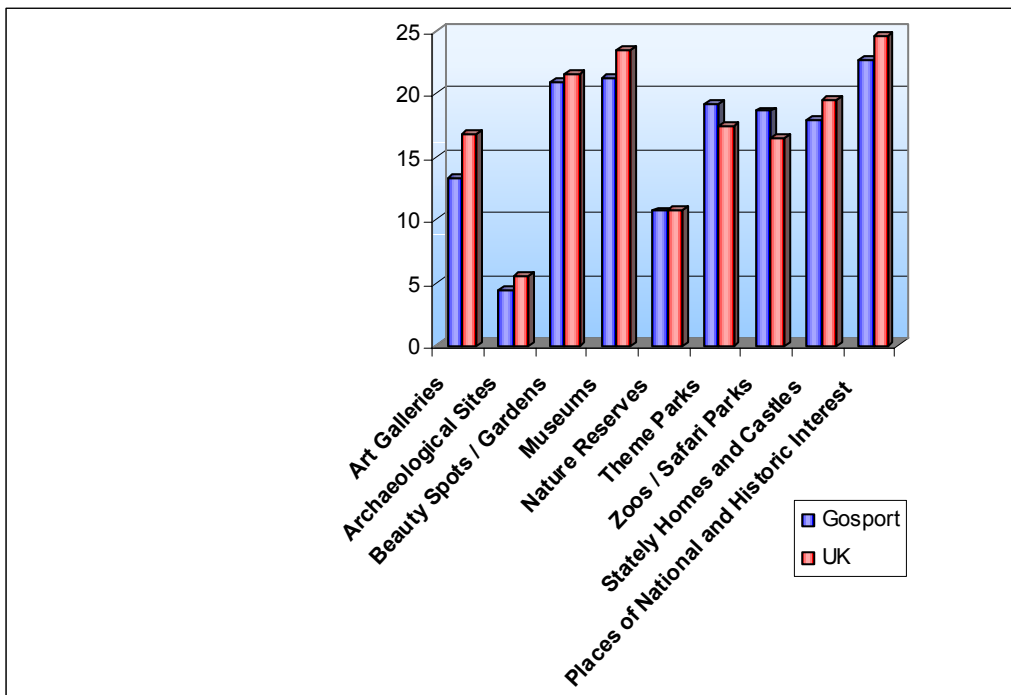
Source: CACI- Fareham Participation Profile (Sport & Leisure)

Gosport

1.06 In Gosport, the CACI Participation Profile on performances shows that there is a significantly low participation rate for visits to the theatre (0.9%) compared to the UK average (1.8%). Attendance at classical music concerts is also low.

1.07 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Gosport, **Figure 3** shows that there are less outings made by residents in Gosport than for the other districts. Visits to theme parks and zoos/safari parks exceed the national average.

Figure 3: Outings over the last 12 months

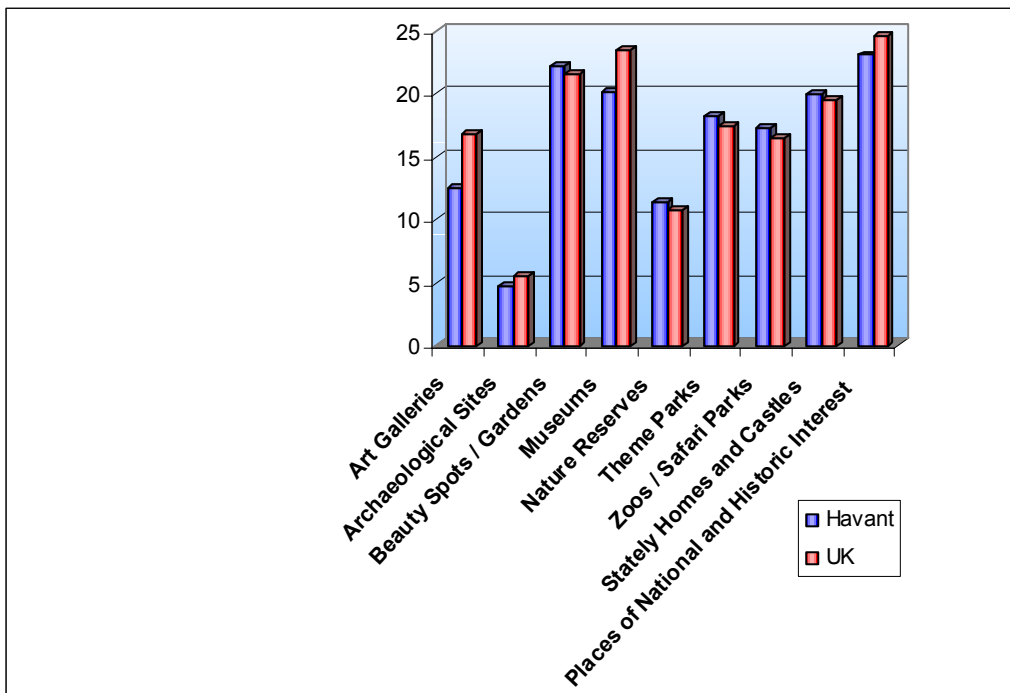


Source: CACI- Gosport Participation Profile (Sport & Leisure)

Havant

- 1.08 In Havant, the CACI Participation Profile on performances shows that going to the cinema is the most popular performance activity although is only 23% compared to the national average of 25%. Havant also has below average participation rates for visits to the theatre and visits to classical music concerts, the opera, plays and jazz concerts.
- 1.09 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Havant, **Figure 4** shows that visits to beauty spots/gardens, nature reserves, theme parks, zoos/safaris parks and stately homes and castles exceed the national average. There is also a higher than average proportion of people who are members of the National Trust and English Heritage. Havant has a below average number of visits to art galleries and museums.

Figure 4: Outings over the last 12 months

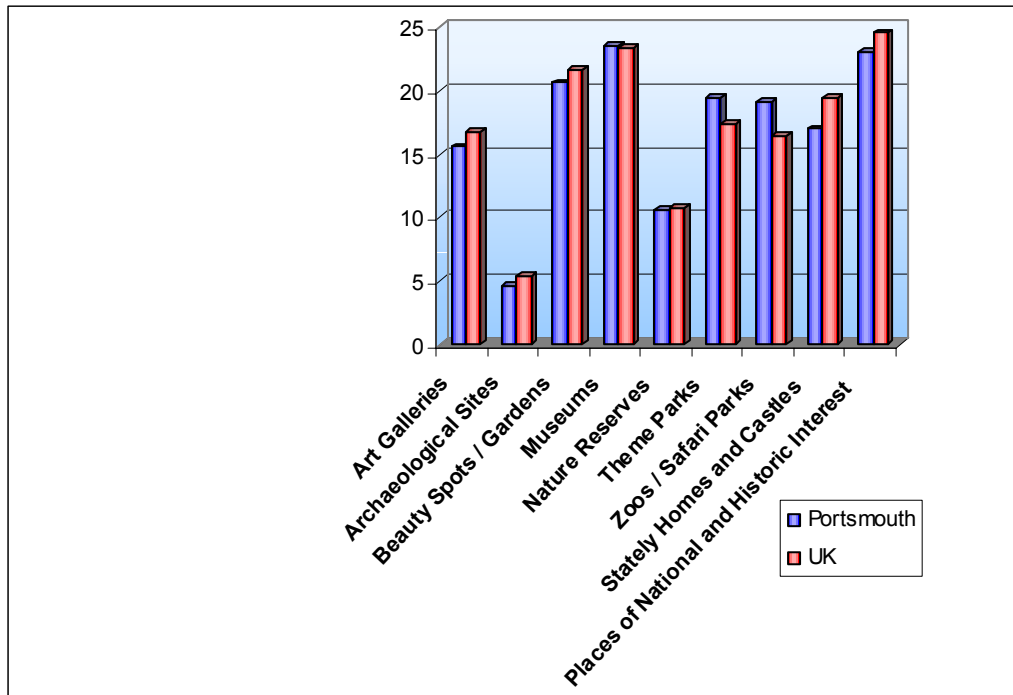


Source: CAC I- Havant Participation Profile (Sport & Leisure)

Portsmouth

- 1.10 In Portsmouth, the CACI Participation Profile on performances shows that going to the cinema is the most popular performance activity with an above average participation rate of 26.2%. Portsmouth also has above average participation rates for going to ballet, contemporary dance and pop and rock concerts. Outings to the theatre on the other hand are well below the national average.
- 1.11 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Portsmouth, **Figure 5** shows that visits to theme parks and zoos/safaris parks exceed the national average, but in all other categories Portsmouth falls below the national average in terms of participation rates. There is a marginally above average proportion of people who are members of English Heritage but below average membership of the National Trust.

Figure 5: Outings over the last 12 months

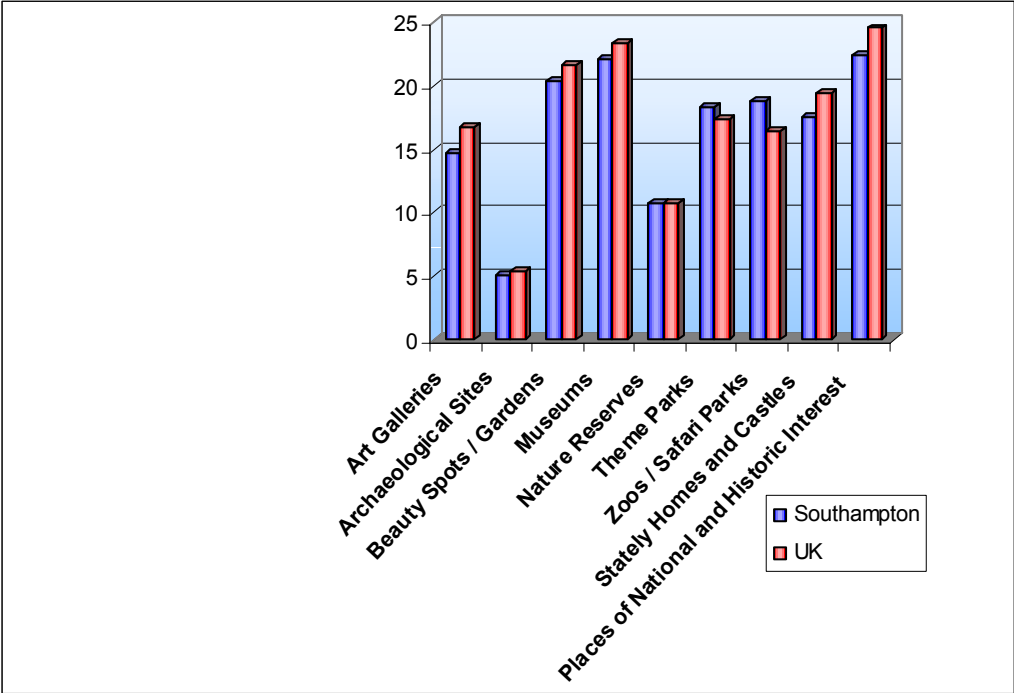


Source: CACI- Portsmouth Participation Profile (Sport & Leisure)

Southampton

- 1.12 In Southampton, the CACI Participation Profile on performances shows that going to the cinema is the most popular performance activity. Southampton also has above average participation rates of going to the Ballet, contemporary dance and pop and rock concerts.
- 1.13 An indicator of an areas' prosperity and its populations' available leisure time is cultural related activities. An indication of this is provided by outings undertaken recently (in the last 12 months). In relation to Southampton, **Figure 6** shows that visits to theme parks and zoos/safari parks exceed the national average, whilst all other categories fall below the national average. There is also a higher than average proportion of people who are members of English Heritage but below average proportion who are members of the National Trust.

Figure: 6: Outings over the last 12 months



Source: CAC I- Southampton Participation Profile (Sport & Leisure)

APPENDIX 17
ASSESSMENT OF ARTS, CULTURAL &
TOURISM POLICIES

Assessment of Arts, Cultural & Tourism Policies

Table 1: Regional and County-wide Policy Assessment

Name of Document	Key Priorities
<i>Regional Policy Documents</i>	
<i>The South East Plan, South East England Regional Assembly (July 2005)</i>	<p>Southampton and Portsmouth are identified as priorities for investment and development as cultural centres as well as other uses;</p> <p>Eastleigh and Fareham should adopt complementary roles to these centres;</p> <p>Tourism and Leisure uses should be promoted within town centres and regular events would add to their attractiveness</p> <p>South East is considered to have significant untapped potential for further tourism related growth.</p> <p>Tourism can provide stronger support for urban renaissance and regeneration, especially in the South Coast resorts.</p> <p>Priorities for the Coastal Strip and the Isle of Wight, which includes South Hampshire are: upgrading facilities; promoting diversity; reducing seasonality; improving access; retaining and enhancing the natural character of the area;</p> <p>Regionally significant tourism attractions should only be developed where they will expand the overall tourism market and can be easily accessed by public transport. Areas where it will contribute to the urban renaissance of a coastal resort are identified as one priority.</p>
<i>The Cultural Cornerstone: A strategy for the Development of Cultural Activity and its Benefits in the South East (June 2001)</i>	<p>There is low theatre capacity within the South East;</p> <p>Under-utilisation of schools and educational institutions as cultural facilities for communities are identified as a gap.</p> <p>There are expected to be increasing participation rates in cultural activities in the future, especially amongst the young and minority groups</p> <p>There will be a move towards increasing life-long learning initiatives, accelerating the opening up of museums and libraries;</p> <p>Priority sectors include the creative industries and tourism</p>
<i>The Cultural Agenda: Realising the Cultural Strategy of the South East England cultural Consortium (November 2002)</i>	<p>Culture is seen as important in contributing to an urban renaissance</p> <p>Public Libraries are viewed as key cultural resources;</p> <p>All communities should have access to cultural facilities</p>

<p><i>Tourism ExSEllence: The Strategy for Tourism in the South East</i></p>	<p>Tourism is already successful in the South East and the challenge for the future is to ensure that tourism grows in a sustainable and successful way;</p> <p>Develop experiential brands into a series of brands and themes which pick up on the regions strengths e.g. yachting, equestrian, maritime, defence</p> <p>Portsmouth and Gosport are identified as destinations where the visitor economy could be a significant force for urban regeneration</p> <p>Invest in accommodation, attractions and other facilities to make places more appealing and inviting, providing a product which keeps pace with rising expectations and to exploit new markets;</p> <p>Develop all types of tourism, including business and conference tourism and niche markets</p>
<p><i>County-wide Policy Documents</i></p>	
<p><i>Tourism Hampshire Statement of Priorities, Tourism South East (2005)</i></p>	<p>Priorities are to ensure effective marketing, improve product development and quality and develop strong partnerships;</p> <p>Portsmouth is identified as a key destination for leisure and holiday breaks;</p> <p>Hampshire should capitalise on specialist markets such as cruise ships in Southampton and Portsmouth and sailing and watersports</p> <p>Hampshire should capitalise on inbound opportunities represented by the ports</p>
<p><i>Hampshire's Tourism Strategy 2000-2005, Hampshire County Council</i></p>	<p>Tourism is important for Hampshire's prosperity, areas of concern include changing patterns of tourism and increasing competition</p> <p>Southampton, Portsmouth and Eastleigh are described as thriving centres, accounting for the majority of Hampshire's business and conference tourism and major contributors to evening and cultural attractions</p> <p>Military Heritage is considered to be a key strength;</p> <p>Portsmouth and Southampton have capitalised on their waterside location most notably through the Portsmouth Harbour Millennium Project</p>
<p><i>Enjoying Hampshire: Hampshire's Cultural Strategy, Hampshire County Council 2003</i></p>	<p>Cultural attributes include its maritime history, its armed services base and its proximity to London;</p> <p>Key issues include improving the quality of existing facilities and developing new facilities;</p> <p>Improving the evening economy of key towns is also identified as a priority;</p> <p>Discovery Centres are highlighted – modernised Library Services with associated learning facilities including local history, museums, visual arts and internet access</p>

Hampshire County Structure Plan

Encourages development that improves or extends the range of tourist, recreational, sporting, social or cultural facilities subject to transport and environment policies.

Table 2: Local Policy Assessment

Name of Document	Key Priorities
Local Policy Documents	
<p><i>From Hill to the Sea: Transforming the Cultural Life of Portsmouth, Portsmouth City Council Cultural Strategy</i></p>	<p>Portsmouth is a popular tourist destination and home to famous historical ships. The sea front is a key feature;</p> <p>The lack of gallery and affordable gallery space is identified as a key issue;</p> <p>Developing Guildhall Square as a venue, amphitheatre and outdoor gallery is identified as a priority</p> <p>Creating a Portsmouth Creative Centre is also identified as a priority.</p> <p>Make Portsmouth’s urban environment attractive through increasing public and private space and spaces for free performances, events, exhibitions and festivals</p>
<p><i>South East Hampshire Area Investment Framework (AIF), Portsmouth and South East Hampshire Partnership, Jan 2004</i></p>	<p>The cultural offer of South East Hampshire is considered to be relatively weak compared to say Bristol or Liverpool;</p> <p>National and international profile of Portsmouth could be developed further and branded;</p> <p>The naval and maritime heritage could be developed further</p> <p>The leisure and general cultural offer could be expanded on key sites around Portsmouth Harbour and build on Gunwharf Quays Development/ Spinnaker Tower</p> <p>Priorities include: a new cultural/visitor facility in Portsmouth; the restoration of the Theatre Royal; the expansion of City Museum to include new temporary exhibition space; relocation and reposition of the Aspex Visual Arts Trust as a regional facility; support for creative industries.</p>

<p><i>Portsmouth City Local Plan Review 2001-2011 Second Deposit</i></p>	<p>Key Priorities include:</p> <p>Land at Exchange Road is allocated for an extension to the New Theatre Royal.</p> <p>Supporting the Historic Dockyard Heritage Area as a tourist area.</p> <p>Supporting Clarence Pier/Furacres for leisure uses.</p> <p>Improved leisure facility at Southsea skate park - possibly a 'Multipurpose Extreme Sports Centre.</p> <p>Concentrating university facilities and arts/cultural activities in and around the city centre.</p> <p>Enhance recreation and leisure facilities at the Mountbatten Centre</p> <p>Improving tourist and leisure attractions at Gunwharf, the Hard and the Historic Dockyard</p> <p>New stadium for Portsmouth Football Club at Fratton Goods Yard.</p>
<p><i>World within the City: A Cultural Strategy for Southampton, Southampton Cultural Consortium(2003)</i></p>	<p>Southampton has a large range of cultural facilities but there is a need to raise their profile;</p> <p>A priority is to attract investment for cultural facilities and to attract major leisure providers and events;</p> <p>A sizeable visitor attraction would help to broadcast Southampton's identity;</p> <p>Southampton has a strong reputation for business and conference tourism but not for leisure based tourism;</p> <p>The city is lacking: a small to medium sized venue for performance, rehearsal and project space; workshop and studio space; storage for the Art Gallery; a Visitor Attraction of regional significance; large scale facility for staging major events and conferences</p> <p>Northern Above Bar is expected to become a dense, lively and viable cluster of arts and cultural facilities.</p> <p>Southampton is identified as a media and digital hub by SEEDA. Proposals are being developed to develop a media centre in the heart of city.</p>
<p><i>City of Southampton Local Plan Revised Deposit (February 2003)</i></p>	<p>Preferred locations for cultural, leisure and tourism uses are Royal Pier, West Quay Phase 3 and the Civic Centre and Guildhall Area.</p>

<p><i>Southampton Area Investment Framework (AIF) 2003 – 2006, The Southampton Partnership</i></p>	<p>There is a perceived lack of cultural and recreational amenities;</p> <p>Existing facilities need to be promoted and areas of weakness tackled;</p> <p>Key gaps include: a major attraction in the city; Creative Industries Hub; Increased studio space; renewing ageing buildings; Northern Above Bar; and improving the quality of Library facilities in the City; the city lacks a large scale events facility.</p>
<p><i>A Draft Cultural Strategy for Gosport 2004 - 2007</i></p>	<p>A proposed Light Rapid Transit System which would link the peninsula with Portsmouth and Fareham would improve cultural opportunities;</p> <p>Identifying opportunities for the refurbishment of the Holbrook Recreation Centre is identified as a priority</p> <p>Provision of bars and restaurants at Royal Clarence Yard is a priority</p> <p>Developing further provision for short stay visitors via new hotel and/or bed and breakfast facilities is a priority</p>
<p><i>Gosport Borough Local Plan Review Revised Deposit Draft (June 2004)</i></p>	<p>Seeking to provide mixed-use developments that enhance retail, leisure and commercial facilities to make the centre more attractive and vibrant. It is noted that community facilities such as museums and entertainment venues are essential.</p>
<p><i>Enjoying Leisure in Fareham, Leisure and Cultural Strategy for Fareham 2003 – 8, Fareham Borough Council</i></p>	<p>Key priorities for developing culture and heritage within the borough include improving and extending Ferneham Hall, attracting a multiplex cinema to Fareham and continuing support for the Ashcroft Arts Centre.</p> <p>More co-ordinated marketing and more effective market research are key priorities for developing tourism.</p>
<p><i>Fareham Borough Local Plan Review (June 2000)</i></p>	<p>Promoting tourism in the Borough. Consideration is being given to expand the tourist information centre and to develop the museum.</p> <p>Recognises that arts and cultural facilities are important to the residents of the Borough.</p>
<p><i>Eastleigh Borough Local Plan Review (2001-2011) Second Deposit</i></p>	<p>Aim to create a leisure and culture zone by capitalising on the amenity of the recreation ground, The Point and the Millennium Dance Garden.</p> <p>Leigh Road is suitable for leisure and cultural facilities.</p>
<p><i>Havant Borough Local Plan (Adopted September 2005)</i></p>	<p>Considered to be limited facilities for recreation and leisure in Waterlooville town centre. Hayling Island remains the focus for tourism development.</p> <p>A site at central Beach lands is considered suitable for a major recreation attraction.</p>

APPENDIX 18
ARTS, CULTURAL & TOURISM ASSESSMENT:
LIST OF CONSULTEES

Arts, Cultural & Tourism Assessment: List of Consultees

Contact Name	Organisation
Charles Freeman	Culture South East
Nicola Rogers	Tourism South East
Tony Witton	Arts Council South East
Richard Ward, Head of Libraries	Hampshire County Council
Margaret Plumbridge, Community Services	Hampshire County Council
Nicola Horsey, Tourism & Culture	Hampshire County Council
Vicky Green, Culture	Portsmouth City Council
Drusilla Moody, Tourism	Portsmouth City Council
Stephen Bailey, Culture & Arts ?	Portsmouth City Council
Paul Raymond, Museums	Portsmouth City Council
Colin Brown, Libraries	Portsmouth Coty Council
Paul Mawson, Head of Tourism	Southampton City Council
David Baldwin, Acting Librbaries, Arts and Heritage Manager	Southampton City Council
Cheryll Butler, Culture	Eastleigh Council
David Martin, Leisure and Amenities Manager	Gosport Council
Claire Hughes, Community Initiative Manager	Havant Council
Tony Mundy, Head of Economic Development	Fareham Council
Charlie Reed, Partnerships and Community Developments Officer	Fareham Council
Tim Craven	City Art Gallery, Southampton
Manager	Theatre Royal, Portsmouth
Curator	Aspex Gallery

APPENDIX 19
SPORTS AND LEISURE PROFILE ANALYSIS

Appendix 19 - Sports and Leisure Profile Analysis

Individual Sports and Activities:	Portsmouth	Southampton	Eastleigh	Fareham	Gosport	Havant	UK
Athletics	0.9	0.9	1.0	1.0	0.9	1.0	1.2
Badminton	2.6	2.7	2.9	2.9	2.7	2.8	2.1
Bowls	1.7	1.8	2.3	2.4	1.8	2.1	2.1
Boxing	0.7	0.7	0.5	0.5	0.7	0.6	0.5
Bird Watching	1.3	1.3	1.8	1.8	1.4	1.6	2.0
Cycling	5.7	5.7	5.6	5.6	5.6	5.4	5.5
Dance Classes	2.8	2.7	3.0	3.0	2.9	2.9	3.3
Fishing	3.5	3.2	3.2	3.0	3.6	3.2	3.2
Golf	4.6	4.7	6.1	6.3	4.9	5.4	5.0
Marathon Running	0.2	0.2	0.2	0.2	0.2	0.2	0.4
Running	2.0	2.1	2.1	2.2	1.9	2.0	2.9
Show Jumping	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Horse Riding	1.0	1.0	1.2	1.3	1.1	1.1	0.9
Ice Skating	0.3	0.3	0.3	0.3	0.3	0.3	0.5
Shooting	0.9	0.9	1.0	1.0	0.9	1.0	1.0
Squash	1.3	1.4	1.5	1.6	1.3	1.4	1.1
Swimming	11.8	11.7	11.8	12.1	11.4	11.1	10.8
Table Tennis	1.5	1.9	2.0	2.1	1.5	1.9	1.1
Tennis	1.8	2.0	2.3	2.4	1.8	2.2	1.8
Wrestling	1.2	0.9	0.8	0.7	1.2	0.9	0.3

Team Sports:	Portsmouth	Southampton	Eastleigh	Fareham	Gosport	Havant	UK
Basketball	1.0	1.0	0.8	0.8	1.0	0.9	0.7
Cricket	1.2	1.4	1.4	1.4	1.2	1.3	1.2
Football	3.6	3.6	4.0	3.9	3.8	3.8	5.9
Hockey	1.1	1.4	1.0	1.1	0.9	1.0	0.6
Ice Hockey	0.3	0.3	0.2	0.2	0.2	0.2	0.2
Rugby Union	0.4	0.4	0.5	0.5	0.4	0.5	0.8
Rugby League	0.2	0.3	0.2	0.2	0.2	0.2	0.4
Volleyball	0.3	0.3	0.3	0.3	0.3	0.3	0.4

Adventure Sports:	Portsmouth	Southampton	Eastleigh	Fareham	Gosport	Havant	UK
Skiing	1.4	1.4	1.6	1.7	1.4	1.5	1.1
Camping	3.3	3.2	3.9	3.8	3.6	3.5	3.4
Climbing / Mountaineering	0.5	0.6	0.6	0.6	0.5	0.5	1.0
Extreme Sports (e.g. BMX, Skateboarding)	2.0	1.5	1.7	1.7	2.1	1.7	0.9
Motor-cycle Racing	0.4	0.3	0.3	0.3	0.4	0.3	0.2
Motor Racing	0.4	0.3	0.2	0.2	0.3	0.2	0.4
Motor Rallying	0.1	0.0	0.0	0.0	0.1	0.0	0.1
Mountain Biking	1.6	1.7	1.5	1.5	1.5	1.5	1.2
Sailing	0.8	0.9	1.2	1.2	0.9	1.1	1.1
Stock-car Racing	0.2	0.2	0.0	0.0	0.1	0.1	0.1
Snowboarding	0.2	0.2	0.2	0.2	0.2	0.2	0.5
Surfing	0.5	0.4	0.4	0.4	0.5	0.4	0.4
Water Skiing	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Windsurfing	0.4	0.4	0.3	0.3	0.4	0.3	0.3

Games & Gambling:	Portsmouth	Southampton	Eastleigh	Fareham	Gosport	Havant	UK
Billiards	0.3	0.3	0.2	0.2	0.3	0.3	0.7
Bingo	3.0	2.6	1.9	1.6	2.9	2.4	2.4
Bridge	0.2	0.3	0.6	0.7	0.3	0.5	0.6
Chess	1.1	1.2	0.9	0.9	0.9	0.9	1.1
Darts	2.4	2.3	2.0	1.9	2.4	2.2	2.4
Football Pools	2.7	2.6	2.9	2.9	3.0	2.8	3.4
Snooker	3.2	3.0	2.9	2.9	3.2	2.9	3.4
Ten Pin Bowling	1.6	1.6	1.4	1.4	1.5	1.4	2.1
Game Machines	2.4	2.4	1.9	1.8	2.3	2.1	2.6
Greyhound Racing (Paid to watch)	4.5	4.7	4.7	4.8	4.6	4.6	3.0
Horse Racing	2.4	2.6	3.0	3.0	2.5	2.7	3.8

Key
Significantly Above Average
Significantly Below Average

APPENDIX 20
CINEMA SCREEN AND SEAT CAPACITY
MODEL

Table 1: Cinema Penetration Rates and Population Catchment (2005)

	Core	Outer
Population @ 2005	830749	166151
PUSH CENTRES	%	%
Odeon - Leisure World, Southampton	25.10%	6.00%
UGC - Ocean Village, Southampton	14.80%	2.30%
Southampton harbour lights	5.20%	2.60%
UCI, Portsmouth	0.70%	
Warner Village, Portsmouth	0.50%	
Odeon, Portsmouth	0.10%	0.40%
Vue Cinema, Gunwarf Quays, Portsmouth	0.90%	0.40%
UCI, Port Solent	0.80%	
The Point, Leigh Rd, Eastleigh	0.60%	
Odeon, Port Solent ⁽¹⁾	0.30%	0.40%
Phoenix Film Theatre, Southampton University, Southampton	0.00%	
subtotal	49.00%	12.10%
Other Centres		
Winchester Screen	0.90%	10.50%
Warner Village, Basingstoke	0.00%	1.10%
Ster Centuary, Basingstoke	0.10%	0.80%
The Screen, Southgate Street, Winchester	0.30%	1.10%
The Comodor Cinema, Star Street, Ryde	0.00%	1.50%
Cineworld Multiplex Cinema, Newport	0.30%	12.80%
subtotal	1.60%	27.80%
Other	49.40%	60.10%
MARKET SHARE TOTAL	100.00%	100.00%

(1) Note: Assumed to be response for UCI - Port Solent
 (2) Data from Southampton & Eastleigh Survey

	Core	Outer
Potential Catchment Population by Zonr	407067	20104
Total Potential Catchment Population	427171	
Market Share (population from Core & Outer Zone) as % of Total Population	43%	

Table 2: Potential for Cinema Screens and Seats (2005 - 2026)

		2005	2011	2016	2021	2026
PUSH Sub-Region Population	A	996900	1,018,477	1,037,012	1,056,069	1,075,663
Market Share	B	43%	43%	43%	43%	43%
Potential Catchment Population	C = A x B	427171	436417	444359	452525	460921
Visits per annum ⁽¹⁾⁽²⁾	D	2.9	3.3	3.7	4.2	4.7
Total Visits Per Annum	E = C x D	1238796.71	1450619	1654871.2	1888212.4	2154830.8
Optimum Visits per Screen ⁽¹⁾	F	75000	75000	75000	75000	75000
Optimum Visits per Seat ⁽¹⁾	G	300	300	300	300	300
Screen Potential	H = E / F	17	19	22	25	29
Seat Potential	I = E / G	4129	4835	5516	6294	7183

(1) Source: Dodona Research - Cinema-going 14 Report (March 2005)
 (2) Derived from Dodona Research (UK Forecasts), with the 2005 figure projected to grow by 2.3% per annum from 2009 onwards to 2026.
 This is based on a continuation of Dodona's annualised growth rate between 2005 and 2009

APPENDIX 21
COMPARISON GOODS RETAIL CAPACITY
ASSESSMENT: SCENARIO 1(A)



Re:Map

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)**Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth**

Assumptions: Constant market shares (2005 - 2026)

Increase in turnover 'efficiency' (or 'productivity') of existing retail businesses of 1% per annum

Projected growth in average spend of 3.8% per annum

Original: 11-Nov-2005
Revised: 15-Dec-2005**STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING** (all monetary figures expressed in constant 2001 prices):

	2001	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
							£m	%
CORE LOCAL AUTHORITY AREA								
EASTLEIGH BOROUGH COUNCIL								
- Population ⁽¹⁾	116,276	119,709	125,048	129,680	134,483	139,464		16.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,579	£3,486	£4,360	£5,254	£6,331	£7,629		118.8%
- Total Available Spend (£million)	£299.9	£417.3	£545.2	£681.3	£851.4	£1,063.9	£647	155.0%
FAREHAM BOROUGH COUNCIL								
- Population ⁽¹⁾	107,808	110,463	114,568	118,105	121,751	125,510		13.6%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,610	£3,528	£4,412	£5,317	£6,407	£7,720.4		118.8%
- Total Available Spend (£million)	£281.4	£389.7	£505.5	£628.0	£780.1	£969.0	£579	148.7%
GOSPORT BOROUGH COUNCIL								
- Population ⁽¹⁾	76,004	75,974	75,928	75,890	75,852	75,814		-0.2%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,436	£3,293	£4,118	£4,963	£5,980	£7,206		118.8%
- Total Available Spend (£million)	£185.1	£250.1	£312.7	£376.6	£453.6	£546.3	£296	118.4%
HAVANT BOROUGH COUNCIL								
- Population ⁽¹⁾	116,814	117,470	118,460	119,291	120,129	120,972		3.0%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,364	£3,195	£3,997	£4,816	£5,803	£6,993		118.8%
- Total Available Spend (£million)	£276.1	£375.3	£473.4	£574.5	£697.1	£845.9	£471	125.4%
PORTSMOUTH CITY COUNCIL								
- Population ⁽¹⁾	186,479	189,028	192,917	196,219	199,578	202,994		7.4%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,358	£3,187	£3,986	£4,804	£5,788	£6,975		118.8%
- Total Available Spend (£million)	£439.7	£602.5	£769.1	£942.6	£1,155.2	£1,415.9	£813	135.0%
SOUTHAMPTON CITY COUNCIL								
- Population ⁽¹⁾	217,497	218,107	219,024	219,792	220,562	221,335		1.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,279	£3,080	£3,853	£4,643	£5,594	£6,741		118.8%
- Total Available Spend (£million)	£495.7	£671.8	£843.9	£1,020.4	£1,233.9	£1,492.1	£820	122.1%
CORE AREA - ALL LOCAL AUTHORITIES:								
TOTAL POPULATION	820,878	830,749	845,945	858,977	872,355	886,089		6.7%
TOTAL AVAILABLE COMPARISON GOODS SPEND (£ million)	£1,977.9	£2,706.8	£3,449.8	£4,223.4	£5,171.3	£6,333.1		134.0%
OUTER AREA - Rest of PUSH Region								
- Population ⁽¹⁾	162,029	166,151	172,531	178,035	183,714	189,574		14.1%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,598	£3,512	£4,392	£5,293	£6,378	£7,685		118.8%
- Total Available Spend (£million)	£421.0	£583.4	£757.8	£942.3	£1,171.6	£1,456.9	£873	149.7%
TOTAL PUSH SUB-REGION								
- Total Population ⁽¹⁾	982,907	996,900	1,018,477	1,037,012	1,056,069	1,075,663		7.9%
- Total Available Comparison Goods Spend £m	£2,399	£3,290	£4,208	£5,166	£6,343	£7,790		136.8%

NOTES: (1) 2001 population figures derived from DTZ's in-house MapInfo TargetPro GIS dataset and based on 2001 Census data. Population projections have been derived from Hampshire County Council and agreed with PUSH
(2) 2001 average spend per capita estimates derived from MapInfo TargetPro GIS dataset. Actual growth rates of +9.6% for 2001/02, +8.7% for 2002/03 and +9.3% for 2003/04 are based on MapInfo Information Brief 05/02.
Projections from 2004 onwards based on the "ultra long term" comparison goods growth rate of 3.8% p.a. as set out in MapInfo Information Brief 05/02.
(3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates at this stage (see ReMap: Stage 3).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 2a: EXISTING TOWN CENTRE FLOORSPACE STOCK - MAIN CENTRES & NON-TOWN CENTRE RETAILING (net square metres):

CORE LOCAL AUTHORITY AREA	Total Floorspace (net square metres)				
	2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL					
MAIN CENTRE: Eastleigh	20,660	20,660	20,660	20,660	20,660
Non-Town Centre	60,375	60,375	60,375	60,375	60,375
FAREHAM BOROUGH COUNCIL					
MAIN CENTRE: Fareham	32,660	32,660	32,660	32,660	32,660
Non-Town Centre	31,889	31,889	31,889	31,889	31,889
GOSPORT BOROUGH COUNCIL					
MAIN CENTRE: Gosport	10,481	10,481	10,481	10,481	10,481
Non-Town Centre	3,526	3,526	3,526	3,526	3,526
HAVANT BOROUGH COUNCIL					
MAIN CENTRE: Havant	11,447	11,447	11,447	11,447	11,447
Non-Town Centre	54,543	54,543	54,543	54,543	54,543
PORTSMOUTH CITY COUNCIL					
MAIN CENTRE: Portsmouth	47,448	47,448	47,448	47,448	47,448
OTHER CENTRE: Southsea	21,488	21,488	21,488	21,488	21,488
Non-Town Centre	50,239	50,239	50,239	50,239	50,239
SOUTHAMPTON CITY COUNCIL					
MAIN CENTRE: Southampton	108,801	108,801	108,801	108,801	108,801
Non-Town Centre	10,539	10,539	10,539	10,539	10,539
TOTAL COMPARISON GOODS FLOORSPACE (net square metres)					
MAIN CENTRES	252,985	252,985	252,985	252,985	252,985
NON-TOWN CENTRE	211,111	211,111	211,111	211,111	211,111
TOTAL NON-FOOD FLOORSPACE	464,096	464,096	464,096	464,096	464,096

SOURCE: All floorspace estimates at the base year have been agreed with the relevant local authorities. See [Appendices 25 - 26](#) for a more detailed explanation on data sources.

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 2b: RETAIL FLOORSPACE COMMITMENTS - WITH PLANNING PERMISSION OR UNDER CONSTRUCTION AT NOVEMBER 2005 (net square metres) :

	Total Commitments (gross sq.m)	Total Floorspace in Pipeline (net sq.m.)				
		2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL						
MAIN CENTRE: Eastleigh	--	0	0	0	0	0
Non-Town Centre Retailing ⁽¹⁾ :	3,652	0	2,739	2,739	2,739	2,739
FAREHAM BOROUGH COUNCIL						
MAIN CENTRE: Fareham ⁽²⁾	13,449	0	10,087	10,087	10,087	10,087
Non-Town Centre Retailing	--	0	0	0	0	0
GOSPORT BOROUGH COUNCIL						
MAIN CENTRE: Gosport	--	0	0	0	0	0
Non-Town Centre Retailing ⁽³⁾ :	1,470	0	1,103	1,103	1,103	1,103
HAVANT BOROUGH COUNCIL						
MAIN CENTRE: Havant	0	0	0	0	0	0
Non-Town Centre Retailing ⁽⁴⁾ :	13,433	0	10,075	10,075	10,075	10,075
PORTSMOUTH CITY COUNCIL						
MAIN CENTRE: Portsmouth City Centre ⁽⁵⁾	2,289	0	1,717	1,717	1,717	1,717
Southsea	--	0	0	0	0	0
Non-Town Centre Retailing ⁽⁶⁾ :	4,418	0	3,314	3,314	3,314	3,314
SOUTHAMPTON CITY COUNCIL						
MAIN CENTRE: Southampton City Centre ⁽⁷⁾ :	7,161	0	5,371	5,371	5,371	5,371
Non-Town Centre Retailing:	--	0	0	0	0	0
TOTAL COMPARISON GOODS FLOORSPACE COMMITMENTS (net square metres)						
	Town Centre Floorspace:	0	17,174	17,174	17,174	17,174
	Non-Town Centre Retail Floorspace:	0	17,230	17,230	17,230	17,230
	TOTAL FLOORSPACE IN THE PIPELINE:	0	34,404	34,404	34,404	34,404

SOURCE: All floorspace commitments have been agreed with the relevant local authorities. See Appendices 27 - 28 for a more detailed explanation on data sources.

Sales areas derived by applying a gross to net ratio of 75%.

NOTES: (1) Extension to Hedge End

(2) Market Quay Phase 3 development and others.

(3) Royal Clarence Yard and Cherque Farm developments

(4) Brockhampton Lane and Potash Terrace retail warehouse schemes.

(5) Commercial Road - new 3-storey development to include retail

(6) Gunwharf Quays and Fratton Road schemes

(7) Carlton Terrace redevelopment and other schemes



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 3:

MARKET SHARE ESTIMATES (% of available comparison goods spend derived from PUSH sub-region)

CORE LOCAL AUTHORITY AREA	Survey-based Market Shares %	2005	2011	2016	2021	2026
		DTZ Adjustments				
To Eastleigh Town Centre	2.8%	3.5%	3.5%	3.5%	3.5%	3.5%
To Fareham Town Centre	12.4%	6.0%	6.0%	6.0%	6.0%	6.0%
To Gosport Town Centre	2.3%	1.5%	1.5%	1.5%	1.5%	1.5%
To Havant Town Centre	4.1%	1.5%	1.5%	1.5%	1.5%	1.5%
To Portsmouth City Centre	12.0%	9.0%	9.0%	9.0%	9.0%	9.0%
To Southsea Town Centre	1.4%	3.0%	3.0%	3.0%	3.0%	3.0%
To Southampton City Centre	16.7%	21.0%	21.0%	21.0%	21.0%	21.0%
To non-Town Centre Retailing	32.1%	27.0%	27.0%	27.0%	27.0%	27.0%
To other major shop locations and stores elsewhere	15.0%	20.5%	20.5%	20.5%	20.5%	20.5%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	1.3%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

OUTER AREA - Rest of PUSH Region	Survey-based Market Shares %	2005	2011	2016	2021	2026
		DTZ Adjustments				
To Eastleigh Town Centre	1.4%	1.5%	1.5%	1.5%	1.5%	1.5%
To Fareham Town Centre	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
To Gosport Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
To Havant Town Centre	6.3%	1.0%	1.0%	1.0%	1.0%	1.0%
To Portsmouth City Centre	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
To Southsea Town Centre	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
To Southampton City Centre	9.5%	9.5%	9.5%	9.5%	9.5%	9.5%
To non-Town Centre Retailing	17.8%	18.5%	18.5%	18.5%	18.5%	18.5%
To other major shop locations and stores elsewhere	55.2%	55.2%	55.2%	55.2%	55.2%	55.2%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	2.5%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside the PUSH sub-region)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
Trade Draw from Core Area	85%	85%	85%	85%	85%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
FAREHAM TOWN CENTRE					
Trade Draw from Core Area	87%	87%	87%	87%	87%
Trade Draw from Rest of PUSH Area	6%	6%	6%	6%	6%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
GOSPORT TOWN CENTRE					
Trade Draw from Core Area	95%	95%	95%	95%	95%
Trade Draw from Rest of PUSH Area	0%	0%	0%	0%	0%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
HAVANT TOWN CENTRE					
Trade Draw from Core Area	81%	81%	81%	81%	81%
Trade Draw from Rest of PUSH Area	12%	12%	12%	12%	12%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
PORTSMOUTH CITY CENTRE					
Trade Draw from Core Area	80%	80%	80%	80%	80%
Trade Draw from Rest of PUSH Area	10%	10%	10%	10%	10%
Trade Draw from Elsewhere (DTZ estimate)	10%	10%	10%	10%	10%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHSEA TOWN CENTRE					
Trade Draw from Core Area	93%	93%	93%	93%	93%
Trade Draw from Rest of PUSH Area	2%	2%	2%	2%	2%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHAMPTON CITY CENTRE					
Trade Draw from Core Area	77%	77%	77%	77%	77%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	15%	15%	15%	15%	15%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
NON-TOWN CENTRE COMPARISON GOODS SPACE					
Trade Draw from Core Area	83%	83%	82%	82%	82%
Trade Draw from Rest of PUSH Area	12%	12%	13%	13%	13%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 5: POTENTIAL TURNOVER OF THE MAIN CENTRES AND NON-TOWN CENTRE COMPARISON GOODS SPACE (£ million):

	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
						£m	%
EASTLEIGH TOWN CENTRE							
Derived Turnover from Core Area	£94.7	£120.7	£147.8	£181.0	£221.7		
Derived Turnover from Rest of PUSH Area	£8.8	£11.4	£14.1	£17.6	£21.9		
Turnover from Elsewhere	£7.8	£9.9	£12.2	£14.9	£18.3		
TOTAL TURNOVER	£111.3	£142.1	£174.1	£213.5	£261.8	£150.56	135.3%
FAREHAM TOWN CENTRE							
Derived Turnover from Core Area	£162.4	£207.0	£253.4	£310.3	£380.0		
Derived Turnover from Rest of PUSH Area	£11.1	£14.4	£17.9	£22.3	£27.7		
Turnover from Elsewhere	£13.1	£16.7	£20.4	£25.0	£30.7		
TOTAL TURNOVER	£186.6	£238.0	£291.7	£357.6	£438.4	£251.80	135.0%
GOSPORT TOWN CENTRE							
Derived Turnover from Core Area	£40.6	£51.7	£63.4	£77.6	£95.0		
Derived Turnover from Rest of PUSH Area	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Elsewhere	£2.1	£2.7	£3.3	£4.1	£5.0		
TOTAL TURNOVER	£42.7	£54.5	£66.7	£81.7	£100.0	£57.26	134.0%
HAVANT TOWN CENTRE							
Derived Turnover from Core Area	£40.6	£51.7	£63.4	£77.6	£95.0		
Derived Turnover from Rest of PUSH Area	£5.8	£7.6	£9.4	£11.7	£14.6		
Turnover from Elsewhere	£3.5	£4.5	£5.5	£6.7	£8.2		
TOTAL TURNOVER	£49.9	£63.8	£78.3	£96.0	£117.8	£67.88	136.0%
PORTSMOUTH CITY CENTRE							
Derived Turnover from Core Area	£243.6	£310.5	£380.1	£465.4	£570.0		
Derived Turnover from Rest of PUSH Area	£29.8	£38.6	£48.1	£59.8	£74.3		
Turnover from Elsewhere	£30.4	£38.8	£47.6	£58.4	£71.6		
TOTAL TURNOVER	£303.7	£387.9	£475.7	£583.5	£715.9	£412.13	135.7%
SOUTHSEA TOWN CENTRE							
Derived Turnover from Core Area	£81.2	£103.5	£126.7	£155.1	£190.0		
Derived Turnover from Rest of PUSH Area	£1.8	£2.3	£2.8	£3.5	£4.4		
Turnover from Elsewhere	£4.4	£5.6	£6.8	£8.4	£10.2		
TOTAL TURNOVER	£87.3	£111.3	£136.3	£167.0	£204.6	£117.28	134.3%
SOUTHAMPTON CITY CENTRE							
Derived Turnover from Core Area	£568.4	£724.5	£886.9	£1,086.0	£1,330.0		
Derived Turnover from Rest of PUSH Area	£55.4	£72.0	£89.5	£111.3	£138.4		
Turnover from Elsewhere	£110.1	£140.5	£172.3	£211.3	£259.1		
TOTAL TURNOVER	£733.9	£937.0	£1,148.7	£1,408.6	£1,727.5	£993.54	135.4%
NON-TOWN CENTRE COMPARISON GOODS SPACE							
Derived Turnover from Core Area	£730.8	£931.4	£1,140.3	£1,396.3	£1,709.9		
Derived Turnover from Rest of PUSH Area	£107.9	£140.2	£174.3	£216.8	£269.5		
Turnover from Elsewhere	£44.1	£56.4	£69.2	£84.9	£104.2		
TOTAL TURNOVER	£882.9	£1,128.0	£1,383.8	£1,697.9	£2,083.7	£1,200.74	136.0%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE							
Derived Turnover from Core Area	£554.9	£707.2	£865.8	£1,060.1	£1,298.3	£743.41	134.0%
Derived Turnover from Rest of PUSH Area	£322.1	£418.3	£520.1	£646.7	£804.2	£482.13	149.7%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING							
Derived Turnover from Core Area	£189.5	£241.5	£295.6	£362.0	£443.3	£253.85	134.0%
Derived Turnover from Rest of PUSH Area	£40.8	£53.0	£66.0	£82.0	£102.0	£61.14	149.7%
PUSH SUB-REGION: TOTAL POTENTIAL TURNOVER (£ million) ⁽¹⁾							
Turnover from Core Area (all Local Authorities)	£2,706.8	£3,449.8	£4,223.4	£5,171.3	£6,333.1		134.0%
Turnover from Rest of PUSH Sub-Region	£583.4	£757.8	£942.3	£1,171.6	£1,456.9		149.7%

NOTES: Turnover from elsewhere represents all spend derived from shoppers and visitors to centres from outside the Core and Rest of PUSH Sub-Region. Based on DTZ judgement of relative attraction and catchment of centres.



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		<u>DTZ Benchmark</u>	2005	2011	2016	2021	2026	
EASTLEIGH TOWN CENTRE	£/square metre	£5,000 - £5,250	£5,386	£6,876	£8,429	£10,335	£12,674	135.3%
	£/square foot		£500	£639	£783	£960	£1,177	
FAREHAM TOWN CENTRE	£/square metre	£5,250 - £5,500	£5,712	£7,289	£8,932	£10,948	£13,422	135.0%
	£/square foot		£531	£677	£830	£1,017	£1,247	
GOSPORT TOWN CENTRE	£/square metre	£3,500 - £3,750	£4,078	£5,197	£6,362	£7,791	£9,541	134.0%
	£/square foot		£379	£483	£591	£724	£886	
HAVANT TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,362	£5,573	£6,836	£8,387	£10,292	136.0%
	£/square foot		£405	£518	£635	£779	£956	
PORTSMOUTH CITY CENTRE	£/square metre	£5,750 - £6,000	£6,402	£8,176	£10,026	£12,298	£15,087	135.7%
	£/square foot		£595	£760	£931	£1,143	£1,402	
SOUTHSEA TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,064	£5,181	£6,345	£7,772	£9,521	134.3%
	£/square foot		£378	£481	£589	£722	£885	
SOUTHAMPTON CITY CENTRE	£/square metre	£6,000 - £6,500	£6,746	£8,612	£10,558	£12,946	£15,877	135.4%
	£/square foot		£627	£800	£981	£1,203	£1,475	
NON-TOWN CENTRE COMPARISON GOODS SPACE	£/square metre	£3,000 - £3,500	£4,182	£5,343	£6,555	£8,043	£9,870	136.0%
	£/square foot		£389	£496	£609	£747	£917	

NOTES: (1) Calculated by dividing potential total comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

STAGE 7:

RESIDUAL SPEND FORECASTS FOR MAIN CENTRES & NON-TOWN CENTRE RETAILING (£ million):

Assumes an annual growth 'efficiency' of: 1.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 1.0% for existing comparison goods floorspace in non-town centre locations

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,386	£5,718	£6,009	£6,316	£6,638
2 Derived Comparison Goods Turnover (£ million):	£111	£118	£124	£130	£137
3 Residual Expenditure (£ million):	£0	£24	£50	£83	£125
FAREHAM TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,712	£6,063	£6,373	£6,698	£7,039
2 Derived Comparison Goods Turnover (£ million):	£187	£198	£208	£219	£230
3 Residual Expenditure (£ million):	£0	£40	£84	£139	£208
GOSPORT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,078	£4,329	£4,549	£4,781	£5,025
2 Derived Comparison Goods Turnover (£ million):	£43	£45	£48	£50	£53
3 Residual Expenditure (£ million):	£0	£9	£19	£32	£47
HAVANT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,362	£4,630	£4,866	£5,115	£5,376
2 Derived Comparison Goods Turnover (£ million):	£50	£53	£56	£59	£62
3 Residual Expenditure (£ million):	£0	£11	£23	£37	£56
PORTSMOUTH CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,402	£6,795	£7,142	£7,506	£7,889
2 Derived Comparison Goods Turnover (£ million):	£304	£322	£339	£356	£374
3 Residual Expenditure (£ million):	£0	£65	£137	£227	£342
SOUTHSEA TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,064	£4,314	£4,534	£4,765	£5,008
2 Derived Comparison Goods Turnover (£ million):	£87	£93	£97	£102	£108
3 Residual Expenditure (£ million):	£0	£19	£39	£65	£97
SOUTHAMPTON CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,746	£7,161	£7,526	£7,910	£8,313
2 Derived Comparison Goods Turnover (£ million):	£734	£779	£819	£861	£905
3 Residual Expenditure (£ million):	£0	£158	£330	£548	£823
NON-TOWN CENTRE RETAILING					
1 Derived Average Sales Density (£/sq.metre):	£4,182	£4,440	£4,666	£4,904	£5,154
2 Derived Comparison Goods Turnover (£ million):	£883	£937	£985	£1,035	£1,088
3 Residual Expenditure (£ million):	£0	£191	£399	£663	£996
TOTAL 'GLOBAL' RESIDUAL EXPENDITURE AVAILABLE TO SUPPORT NEW RETAIL FLOORSPACE (£ million):	£0	£517	£1,080	£1,793	£2,694

NOTES: (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5). Figures in later years based on the base year with an allowance for annual growth as specified.
 (2) Turnover derived by multiplying the average sales density multiplied by the floorspace for the location.
 (3) Residual Expenditure is the potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 8: RESIDUAL SPEND CAPACITY MINUS NEW COMMITMENTS

Assumes an annual growth 'efficiency' of: 1.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 1.0% for existing comparison goods floorspace in non-town centre locations

STAGE 8a: ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL FLOORSPACE COMMITMENTS (i.e with planning permission &/or under construction)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
FAREHAM TOWN CENTRE					
1 Sales area (square metres):	0	10,087	10,087	10,087	10,087
2 Potential average sales density (£ per square metre):	£5,000	£5,308	£5,578	£5,863	£6,162
3 Potential turnover (£ million)	£0.00	£53.54	£56.27	£59.14	£62.15
GOSPORT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
HAVANT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£3,000	£3,185	£3,347	£3,518	£3,697
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
PORTSMOUTH CITY CENTRE					
1 Sales area (square metres):	0	1,717	1,717	1,717	1,717
2 Potential average sales density (£ per square metre):	£5,500	£5,838	£6,136	£6,449	£6,778
3 Potential turnover (£ million)	£0.00	£10.02	£10.53	£11.07	£11.64
SOUTHSEA TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
SOUTHAMPTON CITY CENTRE					
1 Sales area (square metres):	0	5,371	5,371	5,371	5,371
2 Potential average sales density (£ per square metre):	£6,000	£6,369	£6,694	£7,035	£7,394
3 Potential turnover (£ million)	£0.00	£34.21	£35.95	£37.79	£39.71
NON-TOWN CENTRE COMPARISON GOODS SPACE					
1 Sales area (square metres):	0	17,230	17,230	17,230	17,230
2 Potential average sales density (£ per square metre):	£3,000	£3,185	£3,347	£3,518	£3,697
3 Potential turnover (£ million)	£0.00	£54.87	£57.67	£60.61	£63.70
4. TOTAL ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL COMMITMENTS (£ million):	£0	£152.6	£160.4	£168.6	£177.2
5. REVISED 'GLOBAL' RESIDUAL COMPARISON GOODS SPEND (£ million):	£0	£364.1	£919.2	£1,624.8	£2,516.6

STAGE 8b: FORECAST 'GLOBAL' FLOORSPACE CAPACITY (net square metres)

	2005	2011	2016	2021	2026
OPTION 1: Assume average sales density of new floorspace of £4,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£4,000	£4,246	£4,463	£4,690	£4,930
2 Supportable net floorspace (square metres) ⁽²⁾ :	0	85,700	206,000	346,400	510,500
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	107,125	257,500	433,000	638,125
OPTION 2: Assume average sales density of new floorspace of £6,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£6,000	£6,369	£6,694	£7,035	£7,394
2 Supportable new floorspace (net sq m) ⁽²⁾ :	0	57,200	137,300	230,900	340,300
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	71,500	171,625	288,625	425,375

NOTES:

- (1) Source: PUSH Authorities - see **Appendices 27 - 2f** for detailed tables
 (2) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace.
 (3) Assume a net/gross ratio for new floorspace of 75%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1a: Lower Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 9: Leisure Capacity Assessment (A3 / A4 / A5 Use Classes)

	2005	2011	2016	2021	2026
OPTION 1: <u>Assume average sales density of new retail floorspace of £4,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	85,700	206,000	346,400	510,500
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	17,140	41,200	69,280	102,100
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	25,710	61,800	103,920	153,150
OPTION 2: <u>Assume average sales density of new retail floorspace of £6,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	57,200	137,300	230,900	340,300
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	11,440	27,460	46,180	68,060
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	17,160	41,190	69,270	102,090

APPENDIX 22
COMPARISON GOODS RETAIL CAPACITY
ASSESSMENT: SCENARIO 1(B)



Re:Map

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)**Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth**

Assumptions: Constant market shares (2005 - 2026)

Increase in turnover 'efficiency' (or 'productivity') of existing retail businesses of 1% per annum

Projected growth in average spend of 4.8% per annum

Original: 11-Nov-2005
Revised: 15-Dec-2005**STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING** (all monetary figures expressed in constant 2001 prices):

CORE LOCAL AUTHORITY AREA	2001	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
							£m	%
EASTLEIGH BOROUGH COUNCIL								
- Population ⁽¹⁾	116,276	119,709	125,048	129,680	134,483	139,464		16.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,579	£3,519	£4,663	£5,895	£7,452	£9,420		167.7%
- Total Available Spend (£million)	£299.9	£421.3	£583.1	£764.4	£1,002.1	£1,313.8	£892	211.8%
FAREHAM BOROUGH COUNCIL								
- Population ⁽¹⁾	107,808	110,463	114,568	118,105	121,751	125,510		13.6%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,610	£3,562	£4,719	£5,965	£7,541	£9,533		167.7%
- Total Available Spend (£million)	£281.4	£393.4	£540.6	£704.5	£918.2	£1,196.5	£803	204.1%
GOSPORT BOROUGH COUNCIL								
- Population ⁽¹⁾	76,004	75,974	75,928	75,890	75,852	75,814		-0.2%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,436	£3,324	£4,404	£5,568	£7,038	£8,898		167.7%
- Total Available Spend (£million)	£185.1	£252.6	£334.4	£422.5	£533.9	£674.6	£422	167.1%
HAVANT BOROUGH COUNCIL								
- Population ⁽¹⁾	116,814	117,470	118,460	119,291	120,129	120,972		3.0%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,364	£3,226	£4,274	£5,403	£6,830	£8,635		167.7%
- Total Available Spend (£million)	£276.1	£379.0	£506.3	£644.5	£820.5	£1,044.6	£666	175.6%
PORTSMOUTH CITY COUNCIL								
- Population ⁽¹⁾	186,479	189,028	192,917	196,219	199,578	202,994		7.4%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,358	£3,218	£4,263	£5,389	£6,813	£8,613		167.7%
- Total Available Spend (£million)	£439.7	£608.3	£822.4	£1,057.5	£1,359.7	£1,748.4	£1,140	187.4%
SOUTHAMPTON CITY COUNCIL								
- Population ⁽¹⁾	217,497	218,107	219,024	219,792	220,562	221,335		1.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,279	£3,110	£4,120	£5,209	£6,585	£8,324		167.7%
- Total Available Spend (£million)	£495.7	£678.3	£902.5	£1,144.9	£1,452.4	£1,842.5	£1,164	171.6%
CORE AREA - ALL LOCAL AUTHORITIES:								
TOTAL POPULATION	820,878	830,749	845,945	858,977	872,355	886,089		6.7%
TOTAL AVAILABLE COMPARISON GOODS SPEND (£ million)	£1,977.9	£2,732.8	£3,689.3	£4,738.4	£6,086.8	£7,820.3		186.2%
OUTER AREA - Rest of PUSH Region								
- Population ⁽¹⁾	162,029	166,151	172,531	178,035	183,714	189,574		14.1%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,598	£3,545	£4,697	£5,938	£7,507	£9,490		167.7%
- Total Available Spend (£million)	£421.0	£589.1	£810.4	£1,057.2	£1,379.1	£1,799.0	£1,210	205.4%
TOTAL PUSH SUB-REGION								
- Total Population ⁽¹⁾	982,907	996,900	1,018,477	1,037,012	1,056,069	1,075,663		7.9%
- Total Available Comparison Goods Spend £m	£2,399	£3,322	£4,500	£5,796	£7,466	£9,619		189.6%

NOTES: (1) 2001 population figures derived from DTZ's in-house MapInfo TargetPro GIS dataset and based on 2001 Census data. Population projections have been derived from Hampshire County Council and agreed with PUSH
(2) 2001 average spend per capita estimates derived from MapInfo TargetPro GIS dataset. Actual growth rates of +9.6% for 2001/02, +8.7% for 2002/03 and +9.3% for 2003/04 are based on MapInfo Information Brief 05/02.
Projections from 2004 onwards based on the "long term" comparison goods growth rate of 4.8% p.a. as set out in MapInfo Information Brief 05/02.
(3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates at this stage (see ReMap: Stage 3).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 2a: EXISTING TOWN CENTRE FLOORSPACE STOCK - MAIN CENTRES & NON-TOWN CENTRE RETAILING (net square metres):

CORE LOCAL AUTHORITY AREA	Total Floorspace (net square metres)				
	2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL					
MAIN CENTRE: Eastleigh	20,660	20,660	20,660	20,660	20,660
Non-Town Centre	60,375	60,375	60,375	60,375	60,375
FAREHAM BOROUGH COUNCIL					
MAIN CENTRE: Fareham	32,660	32,660	32,660	32,660	32,660
Non-Town Centre	31,889	31,889	31,889	31,889	31,889
GOSPORT BOROUGH COUNCIL					
MAIN CENTRE: Gosport	10,481	10,481	10,481	10,481	10,481
Non-Town Centre	3,526	3,526	3,526	3,526	3,526
HAVANT BOROUGH COUNCIL					
MAIN CENTRE: Havant	11,447	11,447	11,447	11,447	11,447
Non-Town Centre	54,543	54,543	54,543	54,543	54,543
PORTSMOUTH CITY COUNCIL					
MAIN CENTRE: Portsmouth	47,448	47,448	47,448	47,448	47,448
OTHER CENTRE: Southsea	21,488	21,488	21,488	21,488	21,488
Non-Town Centre	50,239	50,239	50,239	50,239	50,239
SOUTHAMPTON CITY COUNCIL					
MAIN CENTRE: Southampton	108,801	108,801	108,801	108,801	108,801
Non-Town Centre	10,539	10,539	10,539	10,539	10,539
TOTAL COMPARISON GOODS FLOORSPACE (net square metres)					
MAIN CENTRES	252,985	252,985	252,985	252,985	252,985
NON-TOWN CENTRE	211,111	211,111	211,111	211,111	211,111
TOTAL NON-FOOD FLOORSPACE	464,096	464,096	464,096	464,096	464,096

SOURCE: All floorspace estimates at the base year have been agreed with the relevant local authorities. See [Appendices 25 - 26](#) for a more detailed explanation on data sources.

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 2b: RETAIL FLOORSPACE COMMITMENTS - WITH PLANNING PERMISSION OR UNDER CONSTRUCTION AT NOVEMBER 2005 (net square metres) :

	Total Commitments (gross sq.m)	Total Floorspace in Pipeline (net sq.m.)				
		2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL						
MAIN CENTRE: Eastleigh	--	0	0	0	0	0
Non-Town Centre Retailing ⁽¹⁾ :	3,652	0	2,739	2,739	2,739	2,739
FAREHAM BOROUGH COUNCIL						
MAIN CENTRE: Fareham ⁽²⁾	13,449	0	10,087	10,087	10,087	10,087
Non-Town Centre Retailing	--	0	0	0	0	0
GOSPORT BOROUGH COUNCIL						
MAIN CENTRE: Gosport	--	0	0	0	0	0
Non-Town Centre Retailing ⁽³⁾ :	1,470	0	1,103	1,103	1,103	1,103
HAVANT BOROUGH COUNCIL						
MAIN CENTRE: Havant	0	0	0	0	0	0
Non-Town Centre Retailing ⁽⁴⁾ :	13,433	0	10,075	10,075	10,075	10,075
PORTSMOUTH CITY COUNCIL						
MAIN CENTRE: Portsmouth City Centre ⁽⁵⁾	2,289	0	1,717	1,717	1,717	1,717
Southsea	--	0	0	0	0	0
Non-Town Centre Retailing ⁽⁶⁾ :	4,418	0	3,314	3,314	3,314	3,314
SOUTHAMPTON CITY COUNCIL						
MAIN CENTRE: Southampton City Centre ⁽⁷⁾ :	7,161	0	5,371	5,371	5,371	5,371
Non-Town Centre Retailing:	--	0	0	0	0	0
TOTAL COMPARISON GOODS FLOORSPACE COMMITMENTS (net square metres)						
	Town Centre Floorspace:	0	17,174	17,174	17,174	17,174
	Non-Town Centre Retail Floorspace:	0	17,230	17,230	17,230	17,230
	TOTAL FLOORSPACE IN THE PIPELINE:	0	34,404	34,404	34,404	34,404

SOURCE: All floorspace commitments have been agreed with the relevant local authorities. See Appendices 27 - 28 for a more detailed explanation on data sources.

Sales areas derived by applying a gross to net ratio of 75%.

NOTES: (1) Extension to Hedge End

(2) Market Quay Phase 3 development and others.

(3) Royal Clarence Yard and Cherque Farm developments

(4) Brockhampton Lane and Potash Terrace retail warehouse schemes.

(5) Commercial Road - new 3-storey development to include retail

(6) Gunwharf Quays and Fratton Road schemes

(7) Carlton Terrace redevelopment and other schemes



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend derived from PUSH sub-region)

CORE LOCAL AUTHORITY AREA		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	2.8%	3.5%	3.5%	3.5%	3.5%	3.5%
To Fareham Town Centre	12.4%	6.0%	6.0%	6.0%	6.0%	6.0%
To Gosport Town Centre	2.3%	1.5%	1.5%	1.5%	1.5%	1.5%
To Havant Town Centre	4.1%	1.5%	1.5%	1.5%	1.5%	1.5%
To Portsmouth City Centre	12.0%	9.0%	9.0%	9.0%	9.0%	9.0%
To Southsea Town Centre	1.4%	3.0%	3.0%	3.0%	3.0%	3.0%
To Southampton City Centre	16.7%	21.0%	21.0%	21.0%	21.0%	21.0%
To non-Town Centre Retailing	32.1%	27.0%	27.0%	27.0%	27.0%	27.0%
To other major shop locations and stores elsewhere	15.0%	20.5%	20.5%	20.5%	20.5%	20.5%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	1.3%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

OUTER AREA - Rest of PUSH Region		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	1.4%	1.5%	1.5%	1.5%	1.5%	1.5%
To Fareham Town Centre	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
To Gosport Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
To Havant Town Centre	6.3%	1.0%	1.0%	1.0%	1.0%	1.0%
To Portsmouth City Centre	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
To Southsea Town Centre	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
To Southampton City Centre	9.5%	9.5%	9.5%	9.5%	9.5%	9.5%
To non-Town Centre Retailing	17.8%	18.5%	18.5%	18.5%	18.5%	18.5%
To other major shop locations and stores elsewhere	55.2%	55.2%	55.2%	55.2%	55.2%	55.2%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	2.5%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside the PUSH sub-region)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
Trade Draw from Core Area	85%	85%	85%	85%	85%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
FAREHAM TOWN CENTRE					
Trade Draw from Core Area	87%	87%	87%	87%	87%
Trade Draw from Rest of PUSH Area	6%	6%	6%	6%	6%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
GOSPORT TOWN CENTRE					
Trade Draw from Core Area	95%	95%	95%	95%	95%
Trade Draw from Rest of PUSH Area	0%	0%	0%	0%	0%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
HAVANT TOWN CENTRE					
Trade Draw from Core Area	81%	81%	81%	81%	81%
Trade Draw from Rest of PUSH Area	12%	12%	12%	12%	12%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
PORTSMOUTH CITY CENTRE					
Trade Draw from Core Area	80%	80%	80%	80%	80%
Trade Draw from Rest of PUSH Area	10%	10%	10%	10%	10%
Trade Draw from Elsewhere (DTZ estimate)	10%	10%	10%	10%	10%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHSEA TOWN CENTRE					
Trade Draw from Core Area	93%	93%	93%	93%	93%
Trade Draw from Rest of PUSH Area	2%	2%	2%	2%	2%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHAMPTON CITY CENTRE					
Trade Draw from Core Area	77%	77%	77%	77%	77%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	15%	15%	15%	15%	15%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
NON-TOWN CENTRE COMPARISON GOODS SPACE					
Trade Draw from Core Area	83%	83%	82%	82%	82%
Trade Draw from Rest of PUSH Area	12%	12%	13%	13%	13%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 5: POTENTIAL TURNOVER OF THE MAIN CENTRES AND NON-TOWN CENTRE COMPARISON GOODS SPACE (£ million):

	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
						£m	%
EASTLEIGH TOWN CENTRE							
Derived Turnover from Core Area	£95.6	£129.1	£165.8	£213.0	£273.7		
Derived Turnover from Rest of PUSH Area	£8.8	£12.2	£15.9	£20.7	£27.0		
Turnover from Elsewhere	£7.9	£10.6	£13.7	£17.6	£22.6		
TOTAL TURNOVER	£112.4	£151.9	£195.4	£251.3	£323.3	£210.98	187.8%
FAREHAM TOWN CENTRE							
Derived Turnover from Core Area	£164.0	£221.4	£284.3	£365.2	£469.2		
Derived Turnover from Rest of PUSH Area	£11.2	£15.4	£20.1	£26.2	£34.2		
Turnover from Elsewhere	£13.2	£17.8	£22.9	£29.5	£37.9		
TOTAL TURNOVER	£188.3	£254.6	£327.3	£420.9	£541.3	£352.94	187.4%
GOSPORT TOWN CENTRE							
Derived Turnover from Core Area	£41.0	£55.3	£71.1	£91.3	£117.3		
Derived Turnover from Rest of PUSH Area	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Elsewhere	£2.2	£2.9	£3.7	£4.8	£6.2		
TOTAL TURNOVER	£43.2	£58.3	£74.8	£96.1	£123.5	£80.33	186.2%
HAVANT TOWN CENTRE							
Derived Turnover from Core Area	£41.0	£55.3	£71.1	£91.3	£117.3		
Derived Turnover from Rest of PUSH Area	£5.9	£8.1	£10.6	£13.8	£18.0		
Turnover from Elsewhere	£3.5	£4.8	£6.1	£7.9	£10.2		
TOTAL TURNOVER	£50.4	£68.2	£87.8	£113.0	£145.5	£95.07	188.6%
PORTSMOUTH CITY CENTRE							
Derived Turnover from Core Area	£246.0	£332.0	£426.5	£547.8	£703.8		
Derived Turnover from Rest of PUSH Area	£30.0	£41.3	£53.9	£70.3	£91.7		
Turnover from Elsewhere	£30.7	£41.5	£53.4	£68.7	£88.4		
TOTAL TURNOVER	£306.7	£414.9	£533.7	£686.8	£884.0	£577.31	188.3%
SOUTHSEA TOWN CENTRE							
Derived Turnover from Core Area	£82.0	£110.7	£142.2	£182.6	£234.6		
Derived Turnover from Rest of PUSH Area	£1.8	£2.4	£3.2	£4.1	£5.4		
Turnover from Elsewhere	£4.4	£6.0	£7.6	£9.8	£12.6		
TOTAL TURNOVER	£88.2	£119.1	£153.0	£196.6	£252.6	£164.48	186.6%
SOUTHAMPTON CITY CENTRE							
Derived Turnover from Core Area	£573.9	£774.7	£995.1	£1,278.2	£1,642.3		
Derived Turnover from Rest of PUSH Area	£56.0	£77.0	£100.4	£131.0	£170.9		
Turnover from Elsewhere	£111.2	£150.3	£193.3	£248.7	£320.0		
TOTAL TURNOVER	£741.0	£1,002.0	£1,288.8	£1,657.9	£2,133.1	£1,392.14	187.9%
NON-TOWN CENTRE COMPARISON GOODS SPACE							
Derived Turnover from Core Area	£737.9	£996.1	£1,279.4	£1,643.4	£2,111.5		
Derived Turnover from Rest of PUSH Area	£109.0	£149.9	£195.6	£255.1	£332.8		
Turnover from Elsewhere	£44.6	£60.3	£77.6	£99.9	£128.6		
TOTAL TURNOVER	£891.4	£1,206.3	£1,552.6	£1,998.5	£2,573.0	£1,681.53	188.6%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE							
Derived Turnover from Core Area	£560.2	£756.3	£971.4	£1,247.8	£1,603.2	£1,042.94	186.2%
Derived Turnover from Rest of PUSH Area	£325.2	£447.3	£583.6	£761.2	£993.0	£667.87	205.4%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING							
Derived Turnover from Core Area	£191.3	£258.2	£331.7	£426.1	£547.4	£356.12	186.2%
Derived Turnover from Rest of PUSH Area	£41.2	£56.7	£74.0	£96.5	£125.9	£84.69	205.4%
PUSH SUB-REGION: TOTAL POTENTIAL TURNOVER (£ million) ⁽¹⁾							
Turnover from Core Area (all Local Authorities)	£2,732.8	£3,689.3	£4,738.4	£6,086.8	£7,820.3		186.2%
Turnover from Rest of PUSH Sub-Region	£589.1	£810.4	£1,057.2	£1,379.1	£1,799.0		205.4%

NOTES: Turnover from elsewhere represents all spend derived from shoppers and visitors to centres from outside the Core and Rest of PUSH Sub-Region. Based on DTZ judgement of relative attraction and catchment of centres.



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		<u>DTZ Benchmark</u>	2005	2011	2016	2021	2026	
EASTLEIGH TOWN CENTRE	£/square metre	£5,000 - £5,250	£5,438	£7,353	£9,457	£12,164	£15,650	187.8%
	£/square foot		£505	£683	£879	£1,130	£1,454	
FAREHAM TOWN CENTRE	£/square metre	£5,250 - £5,500	£5,767	£7,795	£10,021	£12,886	£16,574	187.4%
	£/square foot		£536	£724	£931	£1,197	£1,540	
GOSPORT TOWN CENTRE	£/square metre	£3,500 - £3,750	£4,117	£5,558	£7,138	£9,170	£11,781	186.2%
	£/square foot		£382	£516	£663	£852	£1,095	
HAVANT TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,404	£5,960	£7,669	£9,872	£12,709	188.6%
	£/square foot		£409	£554	£713	£917	£1,181	
PORTSMOUTH CITY CENTRE	£/square metre	£5,750 - £6,000	£6,463	£8,743	£11,249	£14,475	£18,630	188.3%
	£/square foot		£600	£812	£1,045	£1,345	£1,731	
SOUTHSEA TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,103	£5,541	£7,119	£9,148	£11,757	186.6%
	£/square foot		£381	£515	£661	£850	£1,092	
SOUTHAMPTON CITY CENTRE	£/square metre	£6,000 - £6,500	£6,811	£9,210	£11,846	£15,238	£19,606	187.9%
	£/square foot		£633	£856	£1,100	£1,416	£1,821	
NON-TOWN CENTRE COMPARISON GOODS SPACE	£/square metre	£3,000 - £3,500	£4,223	£5,714	£7,354	£9,467	£12,188	188.6%
	£/square foot		£392	£531	£683	£879	£1,132	

NOTES: (1) Calculated by dividing potential total comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

STAGE 7:

RESIDUAL SPEND FORECASTS FOR MAIN CENTRES & NON-TOWN CENTRE RETAILING (£ million):

Assumes an annual growth 'efficiency' of: 1.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 1.0% for existing comparison goods floorspace in non-town centre locations

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,438	£5,773	£6,067	£6,377	£6,702
2 Derived Comparison Goods Turnover (£ million):	£112	£119	£125	£132	£138
3 Residual Expenditure (£ million):	£0	£33	£70	£120	£185
FAREHAM TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,767	£6,122	£6,434	£6,762	£7,107
2 Derived Comparison Goods Turnover (£ million):	£188	£200	£210	£221	£232
3 Residual Expenditure (£ million):	£0	£55	£117	£200	£309
GOSPORT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,117	£4,370	£4,593	£4,828	£5,074
2 Derived Comparison Goods Turnover (£ million):	£43	£46	£48	£51	£53
3 Residual Expenditure (£ million):	£0	£12	£27	£46	£70
HAVANT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,404	£4,675	£4,913	£5,164	£5,427
2 Derived Comparison Goods Turnover (£ million):	£50	£54	£56	£59	£62
3 Residual Expenditure (£ million):	£0	£15	£32	£54	£83
PORTSMOUTH CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,463	£6,861	£7,211	£7,579	£7,965
2 Derived Comparison Goods Turnover (£ million):	£307	£326	£342	£360	£378
3 Residual Expenditure (£ million):	£0	£89	£192	£327	£506
SOUTHSEA TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,103	£4,355	£4,577	£4,811	£5,056
2 Derived Comparison Goods Turnover (£ million):	£88	£94	£98	£103	£109
3 Residual Expenditure (£ million):	£0	£25	£55	£93	£144
SOUTHAMPTON CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,811	£7,230	£7,598	£7,986	£8,393
2 Derived Comparison Goods Turnover (£ million):	£741	£787	£827	£869	£913
3 Residual Expenditure (£ million):	£0	£215	£462	£789	£1,220
NON-TOWN CENTRE RETAILING					
1 Derived Average Sales Density (£/sq.metre):	£4,223	£4,482	£4,711	£4,951	£5,204
2 Derived Comparison Goods Turnover (£ million):	£891	£946	£995	£1,045	£1,099
3 Residual Expenditure (£ million):	£0	£260	£558	£953	£1,474
TOTAL 'GLOBAL' RESIDUAL EXPENDITURE AVAILABLE TO SUPPORT NEW RETAIL FLOORSPACE (£ million):	£0	£705	£1,512	£2,582	£3,992

NOTES: (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5). Figures in later years based on the base year with an allowance for annual growth as specified.
 (2) Turnover derived by multiplying the average sales density multiplied by the floorspace for the location.
 (3) Residual Expenditure is the potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 8: RESIDUAL SPEND CAPACITY MINUS NEW COMMITMENTS

Assumes an annual growth 'efficiency' of: 1.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 1.0% for existing comparison goods floorspace in non-town centre locations

STAGE 8a: ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL FLOORSPACE COMMITMENTS (i.e with planning permission &/or under construction)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
FAREHAM TOWN CENTRE					
1 Sales area (square metres):	0	10,087	10,087	10,087	10,087
2 Potential average sales density (£ per square metre):	£5,000	£5,308	£5,578	£5,863	£6,162
3 Potential turnover (£ million)	£0.00	£53.54	£56.27	£59.14	£62.15
GOSPORT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
HAVANT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£3,000	£3,185	£3,347	£3,518	£3,697
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
PORTSMOUTH CITY CENTRE					
1 Sales area (square metres):	0	1,717	1,717	1,717	1,717
2 Potential average sales density (£ per square metre):	£5,500	£5,838	£6,136	£6,449	£6,778
3 Potential turnover (£ million)	£0.00	£10.02	£10.53	£11.07	£11.64
SOUTHSEA TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
SOUTHAMPTON CITY CENTRE					
1 Sales area (square metres):	0	5,371	5,371	5,371	5,371
2 Potential average sales density (£ per square metre):	£6,000	£6,369	£6,694	£7,035	£7,394
3 Potential turnover (£ million)	£0.00	£34.21	£35.95	£37.79	£39.71
NON-TOWN CENTRE COMPARISON GOODS SPACE					
1 Sales area (square metres):	0	17,230	17,230	17,230	17,230
2 Potential average sales density (£ per square metre):	£3,000	£3,185	£3,347	£3,518	£3,697
3 Potential turnover (£ million)	£0.00	£54.87	£57.67	£60.61	£63.70
4. TOTAL ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL COMMITMENTS (£ million):	£0	£152.6	£160.4	£168.6	£177.2
5. REVISED 'GLOBAL' RESIDUAL COMPARISON GOODS SPEND (£ million):	£0	£552.1	£1,351.3	£2,413.1	£3,814.8

STAGE 8b: FORECAST 'GLOBAL' FLOORSPACE CAPACITY (net square metres)

	2005	2011	2016	2021	2026
OPTION 1: Assume average sales density of new floorspace of £4,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£4,000	£4,246	£4,463	£4,690	£4,930
2 Supportable net floorspace (square metres) ⁽²⁾ :	0	130,000	302,800	514,500	773,900
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	162,900	378,500	643,125	967,375
OPTION 2: Assume average sales density of new floorspace of £6,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£6,000	£6,369	£6,694	£7,035	£7,394
2 Supportable new floorspace (net sq m) ⁽²⁾ :	0	86,700	201,900	343,000	515,900
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	108,375	252,375	428,750	644,875

NOTES:

- (1) Source: PUSH Authorities - see **Appendices 27 - 2f** for detailed tables
 (2) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace.
 (3) Assume a net/gross ratio for new floorspace of 75%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 1b: Higher Expenditure Growth & Lower Turnover 'Efficiency' Growth

STAGE 9: Leisure Capacity Assessment (A3 / A4 / A5 Use Classes)

	2005	2011	2016	2021	2026
OPTION 1: <u>Assume average sales density of new retail floorspace of £4,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	130,000	302,800	514,500	773,900
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	26,000	60,560	102,900	154,780
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	39,000	90,840	154,350	232,170
OPTION 2: <u>Assume average sales density of new retail floorspace of £6,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	86,700	201,900	343,000	515,900
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	17,340	40,380	68,600	103,180
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	26,010	60,570	102,900	154,770

APPENDIX 23
COMPARISON GOODS RETAIL CAPACITY
ASSESSMENT SCENARIO 2(A)



Re:Map

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)**Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth**

Assumptions: Constant market shares (2005 - 2026)

Increase in turnover 'efficiency' (or 'productivity') of existing retail businesses of 2% per annum

Projected growth in average spend of 3.8% per annum

Original: 11-Nov-2005
Revised: 15-Dec-2005**STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING** (all monetary figures expressed in constant 2001 prices):

	2001	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
							£m	%
CORE LOCAL AUTHORITY AREA								
EASTLEIGH BOROUGH COUNCIL								
- Population ⁽¹⁾	116,276	119,709	125,048	129,680	134,483	139,464		16.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,579	£3,486	£4,360	£5,254	£6,331	£7,629		118.8%
- Total Available Spend (£million)	£299.9	£417.3	£545.2	£681.3	£851.4	£1,063.9	£647	155.0%
FAREHAM BOROUGH COUNCIL								
- Population ⁽¹⁾	107,808	110,463	114,568	118,105	121,751	125,510		13.6%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,610	£3,528	£4,412	£5,317	£6,407	£7,720.4		118.8%
- Total Available Spend (£million)	£281.4	£389.7	£505.5	£628.0	£780.1	£969.0	£579	148.7%
GOSPORT BOROUGH COUNCIL								
- Population ⁽¹⁾	76,004	75,974	75,928	75,890	75,852	75,814		-0.2%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,436	£3,293	£4,118	£4,963	£5,980	£7,206		118.8%
- Total Available Spend (£million)	£185.1	£250.1	£312.7	£376.6	£453.6	£546.3	£296	118.4%
HAVANT BOROUGH COUNCIL								
- Population ⁽¹⁾	116,814	117,470	118,460	119,291	120,129	120,972		3.0%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,364	£3,195	£3,997	£4,816	£5,803	£6,993		118.8%
- Total Available Spend (£million)	£276.1	£375.3	£473.4	£574.5	£697.1	£845.9	£471	125.4%
PORTSMOUTH CITY COUNCIL								
- Population ⁽¹⁾	186,479	189,028	192,917	196,219	199,578	202,994		7.4%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,358	£3,187	£3,986	£4,804	£5,788	£6,975		118.8%
- Total Available Spend (£million)	£439.7	£602.5	£769.1	£942.6	£1,155.2	£1,415.9	£813	135.0%
SOUTHAMPTON CITY COUNCIL								
- Population ⁽¹⁾	217,497	218,107	219,024	219,792	220,562	221,335		1.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,279	£3,080	£3,853	£4,643	£5,594	£6,741		118.8%
- Total Available Spend (£million)	£495.7	£671.8	£843.9	£1,020.4	£1,233.9	£1,492.1	£820	122.1%
CORE AREA - ALL LOCAL AUTHORITIES:								
TOTAL POPULATION	820,878	830,749	845,945	858,977	872,355	886,089		6.7%
TOTAL AVAILABLE COMPARISON GOODS SPEND (£ million)	£1,977.9	£2,706.8	£3,449.8	£4,223.4	£5,171.3	£6,333.1		134.0%
OUTER AREA - Rest of PUSH Region								
- Population ⁽¹⁾	162,029	166,151	172,531	178,035	183,714	189,574		14.1%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,598	£3,512	£4,392	£5,293	£6,378	£7,685		118.8%
- Total Available Spend (£million)	£421.0	£583.4	£757.8	£942.3	£1,171.6	£1,456.9	£873	149.7%
TOTAL PUSH SUB-REGION								
- Total Population ⁽¹⁾	982,907	996,900	1,018,477	1,037,012	1,056,069	1,075,663		7.9%
- Total Available Comparison Goods Spend £m	£2,399	£3,290	£4,208	£5,166	£6,343	£7,790		136.8%

NOTES: (1) 2001 population figures derived from DTZ's in-house MapInfo TargetPro GIS dataset and based on 2001 Census data. Population projections have been derived from Hampshire County Council and agreed with PUSH
(2) 2001 average spend per capita estimates derived from MapInfo TargetPro GIS dataset. Actual growth rates of +9.6% for 2001/02, +8.7% for 2002/03 and +9.3% for 2003/04 are based on MapInfo Information Brief 05/02.
Projections from 2004 onwards based on the "ultra long term" comparison goods growth rate of 3.8% p.a. as set out in MapInfo Information Brief 05/02.
(3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates at this stage (see ReMap: Stage 3).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 2a: EXISTING TOWN CENTRE FLOORSPACE STOCK - MAIN CENTRES & NON-TOWN CENTRE RETAILING (net square metres):

CORE LOCAL AUTHORITY AREA	Total Floorspace (net square metres)				
	2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL					
MAIN CENTRE: Eastleigh	20,660	20,660	20,660	20,660	20,660
Non-Town Centre	60,375	60,375	60,375	60,375	60,375
FAREHAM BOROUGH COUNCIL					
MAIN CENTRE: Fareham	32,660	32,660	32,660	32,660	32,660
Non-Town Centre	31,889	31,889	31,889	31,889	31,889
GOSPORT BOROUGH COUNCIL					
MAIN CENTRE: Gosport	10,481	10,481	10,481	10,481	10,481
Non-Town Centre	3,526	3,526	3,526	3,526	3,526
HAVANT BOROUGH COUNCIL					
MAIN CENTRE: Havant	11,447	11,447	11,447	11,447	11,447
Non-Town Centre	54,543	54,543	54,543	54,543	54,543
PORTSMOUTH CITY COUNCIL					
MAIN CENTRE: Portsmouth	47,448	47,448	47,448	47,448	47,448
OTHER CENTRE: Southsea	21,488	21,488	21,488	21,488	21,488
Non-Town Centre	50,239	50,239	50,239	50,239	50,239
SOUTHAMPTON CITY COUNCIL					
MAIN CENTRE: Southampton	108,801	108,801	108,801	108,801	108,801
Non-Town Centre	10,539	10,539	10,539	10,539	10,539
TOTAL COMPARISON GOODS FLOORSPACE (net square metres)					
MAIN CENTRES	252,985	252,985	252,985	252,985	252,985
NON-TOWN CENTRE	211,111	211,111	211,111	211,111	211,111
TOTAL NON-FOOD FLOORSPACE	464,096	464,096	464,096	464,096	464,096

SOURCE: All floorspace estimates at the base year have been agreed with the relevant local authorities. See [Appendices 25 - 26](#) for a more detailed explanation on data sources.

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 2b: RETAIL FLOORSPACE COMMITMENTS - WITH PLANNING PERMISSION OR UNDER CONSTRUCTION AT NOVEMBER 2005 (net square metres) :

	Total Commitments (gross sq.m)	Total Floorspace in Pipeline (net sq.m.)				
		2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL						
MAIN CENTRE: Eastleigh	--	0	0	0	0	0
Non-Town Centre Retailing ⁽¹⁾ :	3,652	0	2,739	2,739	2,739	2,739
FAREHAM BOROUGH COUNCIL						
MAIN CENTRE: Fareham ⁽²⁾	13,449	0	10,087	10,087	10,087	10,087
Non-Town Centre Retailing	--	0	0	0	0	0
GOSPORT BOROUGH COUNCIL						
MAIN CENTRE: Gosport	--	0	0	0	0	0
Non-Town Centre Retailing ⁽³⁾ :	1,470	0	1,103	1,103	1,103	1,103
HAVANT BOROUGH COUNCIL						
MAIN CENTRE: Havant	0	0	0	0	0	0
Non-Town Centre Retailing ⁽⁴⁾ :	13,433	0	10,075	10,075	10,075	10,075
PORTSMOUTH CITY COUNCIL						
MAIN CENTRE: Portsmouth City Centre ⁽⁵⁾	2,289	0	1,717	1,717	1,717	1,717
Southsea	--	0	0	0	0	0
Non-Town Centre Retailing ⁽⁶⁾ :	4,418	0	3,314	3,314	3,314	3,314
SOUTHAMPTON CITY COUNCIL						
MAIN CENTRE: Southampton City Centre ⁽⁷⁾ :	7,161	0	5,371	5,371	5,371	5,371
Non-Town Centre Retailing:	--	0	0	0	0	0
TOTAL COMPARISON GOODS FLOORSPACE COMMITMENTS (net square metres)						
	Town Centre Floorspace:	0	17,174	17,174	17,174	17,174
	Non-Town Centre Retail Floorspace:	0	17,230	17,230	17,230	17,230
	TOTAL FLOORSPACE IN THE PIPELINE:	0	34,404	34,404	34,404	34,404

SOURCE: All floorspace commitments have been agreed with the relevant local authorities. See Appendices 27 - 28 for a more detailed explanation on data sources.

Sales areas derived by applying a gross to net ratio of 75%.

NOTES: (1) Extension to Hedge End

(2) Market Quay Phase 3 development and others.

(3) Royal Clarence Yard and Cherque Farm developments

(4) Brockhampton Lane and Potash Terrace retail warehouse schemes.

(5) Commercial Road - new 3-storey development to include retail

(6) Gunwharf Quays and Fratton Road schemes

(7) Carlton Terrace redevelopment and other schemes



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 3:

MARKET SHARE ESTIMATES (% of available comparison goods spend derived from PUSH sub-region)

CORE LOCAL AUTHORITY AREA		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	2.8%	3.5%	3.5%	3.5%	3.5%	3.5%
To Fareham Town Centre	12.4%	6.0%	6.0%	6.0%	6.0%	6.0%
To Gosport Town Centre	2.3%	1.5%	1.5%	1.5%	1.5%	1.5%
To Havant Town Centre	4.1%	1.5%	1.5%	1.5%	1.5%	1.5%
To Portsmouth City Centre	12.0%	9.0%	9.0%	9.0%	9.0%	9.0%
To Southsea Town Centre	1.4%	3.0%	3.0%	3.0%	3.0%	3.0%
To Southampton City Centre	16.7%	21.0%	21.0%	21.0%	21.0%	21.0%
To non-Town Centre Retailing	32.1%	27.0%	27.0%	27.0%	27.0%	27.0%
To other major shop locations and stores elsewhere	15.0%	20.5%	20.5%	20.5%	20.5%	20.5%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	1.3%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

OUTER AREA - Rest of PUSH Region		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	1.4%	1.5%	1.5%	1.5%	1.5%	1.5%
To Fareham Town Centre	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
To Gosport Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
To Havant Town Centre	6.3%	1.0%	1.0%	1.0%	1.0%	1.0%
To Portsmouth City Centre	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
To Southsea Town Centre	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
To Southampton City Centre	9.5%	9.5%	9.5%	9.5%	9.5%	9.5%
To non-Town Centre Retailing	17.8%	18.5%	18.5%	18.5%	18.5%	18.5%
To other major shop locations and stores elsewhere	55.2%	55.2%	55.2%	55.2%	55.2%	55.2%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	2.5%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside the PUSH sub-region)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
Trade Draw from Core Area	85%	85%	85%	85%	85%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
FAREHAM TOWN CENTRE					
Trade Draw from Core Area	87%	87%	87%	87%	87%
Trade Draw from Rest of PUSH Area	6%	6%	6%	6%	6%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
GOSPORT TOWN CENTRE					
Trade Draw from Core Area	95%	95%	95%	95%	95%
Trade Draw from Rest of PUSH Area	0%	0%	0%	0%	0%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
HAVANT TOWN CENTRE					
Trade Draw from Core Area	81%	81%	81%	81%	81%
Trade Draw from Rest of PUSH Area	12%	12%	12%	12%	12%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
PORTSMOUTH CITY CENTRE					
Trade Draw from Core Area	80%	80%	80%	80%	80%
Trade Draw from Rest of PUSH Area	10%	10%	10%	10%	10%
Trade Draw from Elsewhere (DTZ estimate)	10%	10%	10%	10%	10%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHSEA TOWN CENTRE					
Trade Draw from Core Area	93%	93%	93%	93%	93%
Trade Draw from Rest of PUSH Area	2%	2%	2%	2%	2%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHAMPTON CITY CENTRE					
Trade Draw from Core Area	77%	77%	77%	77%	77%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	15%	15%	15%	15%	15%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
NON-TOWN CENTRE COMPARISON GOODS SPACE					
Trade Draw from Core Area	83%	83%	82%	82%	82%
Trade Draw from Rest of PUSH Area	12%	12%	13%	13%	13%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 5: POTENTIAL TURNOVER OF THE MAIN CENTRES AND NON-TOWN CENTRE COMPARISON GOODS SPACE (£ million):

	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
						£m	%
EASTLEIGH TOWN CENTRE							
Derived Turnover from Core Area	£94.7	£120.7	£147.8	£181.0	£221.7		
Derived Turnover from Rest of PUSH Area	£8.8	£11.4	£14.1	£17.6	£21.9		
Turnover from Elsewhere	£7.8	£9.9	£12.2	£14.9	£18.3		
TOTAL TURNOVER	£111.3	£142.1	£174.1	£213.5	£261.8	£150.56	135.3%
FAREHAM TOWN CENTRE							
Derived Turnover from Core Area	£162.4	£207.0	£253.4	£310.3	£380.0		
Derived Turnover from Rest of PUSH Area	£11.1	£14.4	£17.9	£22.3	£27.7		
Turnover from Elsewhere	£13.1	£16.7	£20.4	£25.0	£30.7		
TOTAL TURNOVER	£186.6	£238.0	£291.7	£357.6	£438.4	£251.80	135.0%
GOSPORT TOWN CENTRE							
Derived Turnover from Core Area	£40.6	£51.7	£63.4	£77.6	£95.0		
Derived Turnover from Rest of PUSH Area	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Elsewhere	£2.1	£2.7	£3.3	£4.1	£5.0		
TOTAL TURNOVER	£42.7	£54.5	£66.7	£81.7	£100.0	£57.26	134.0%
HAVANT TOWN CENTRE							
Derived Turnover from Core Area	£40.6	£51.7	£63.4	£77.6	£95.0		
Derived Turnover from Rest of PUSH Area	£5.8	£7.6	£9.4	£11.7	£14.6		
Turnover from Elsewhere	£3.5	£4.5	£5.5	£6.7	£8.2		
TOTAL TURNOVER	£49.9	£63.8	£78.3	£96.0	£117.8	£67.88	136.0%
PORTSMOUTH CITY CENTRE							
Derived Turnover from Core Area	£243.6	£310.5	£380.1	£465.4	£570.0		
Derived Turnover from Rest of PUSH Area	£29.8	£38.6	£48.1	£59.8	£74.3		
Turnover from Elsewhere	£30.4	£38.8	£47.6	£58.4	£71.6		
TOTAL TURNOVER	£303.7	£387.9	£475.7	£583.5	£715.9	£412.13	135.7%
SOUTHSEA TOWN CENTRE							
Derived Turnover from Core Area	£81.2	£103.5	£126.7	£155.1	£190.0		
Derived Turnover from Rest of PUSH Area	£1.8	£2.3	£2.8	£3.5	£4.4		
Turnover from Elsewhere	£4.4	£5.6	£6.8	£8.4	£10.2		
TOTAL TURNOVER	£87.3	£111.3	£136.3	£167.0	£204.6	£117.28	134.3%
SOUTHAMPTON CITY CENTRE							
Derived Turnover from Core Area	£568.4	£724.5	£886.9	£1,086.0	£1,330.0		
Derived Turnover from Rest of PUSH Area	£55.4	£72.0	£89.5	£111.3	£138.4		
Turnover from Elsewhere	£110.1	£140.5	£172.3	£211.3	£259.1		
TOTAL TURNOVER	£733.9	£937.0	£1,148.7	£1,408.6	£1,727.5	£993.54	135.4%
NON-TOWN CENTRE COMPARISON GOODS SPACE							
Derived Turnover from Core Area	£730.8	£931.4	£1,140.3	£1,396.3	£1,709.9		
Derived Turnover from Rest of PUSH Area	£107.9	£140.2	£174.3	£216.8	£269.5		
Turnover from Elsewhere	£44.1	£56.4	£69.2	£84.9	£104.2		
TOTAL TURNOVER	£882.9	£1,128.0	£1,383.8	£1,697.9	£2,083.7	£1,200.74	136.0%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE							
Derived Turnover from Core Area	£554.9	£707.2	£865.8	£1,060.1	£1,298.3	£743.41	134.0%
Derived Turnover from Rest of PUSH Area	£322.1	£418.3	£520.1	£646.7	£804.2	£482.13	149.7%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING							
Derived Turnover from Core Area	£189.5	£241.5	£295.6	£362.0	£443.3	£253.85	134.0%
Derived Turnover from Rest of PUSH Area	£40.8	£53.0	£66.0	£82.0	£102.0	£61.14	149.7%
PUSH SUB-REGION: TOTAL POTENTIAL TURNOVER (£ million) ⁽¹⁾							
Turnover from Core Area (all Local Authorities)	£2,706.8	£3,449.8	£4,223.4	£5,171.3	£6,333.1		134.0%
Turnover from Rest of PUSH Sub-Region	£583.4	£757.8	£942.3	£1,171.6	£1,456.9		149.7%

NOTES: Turnover from elsewhere represents all spend derived from shoppers and visitors to centres from outside the Core and Rest of PUSH Sub-Region. Based on DTZ judgement of relative attraction and catchment of centres.



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		<u>DTZ Benchmark</u>	2005	2011	2016	2021	2026	
EASTLEIGH TOWN CENTRE	£/square metre	£5,000 - £5,250	£5,386	£6,876	£8,429	£10,335	£12,674	135.3%
	£/square foot		£500	£639	£783	£960	£1,177	
FAREHAM TOWN CENTRE	£/square metre	£5,250 - £5,500	£5,712	£7,289	£8,932	£10,948	£13,422	135.0%
	£/square foot		£531	£677	£830	£1,017	£1,247	
GOSPORT TOWN CENTRE	£/square metre	£3,500 - £3,750	£4,078	£5,197	£6,362	£7,791	£9,541	134.0%
	£/square foot		£379	£483	£591	£724	£886	
HAVANT TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,362	£5,573	£6,836	£8,387	£10,292	136.0%
	£/square foot		£405	£518	£635	£779	£956	
PORTSMOUTH CITY CENTRE	£/square metre	£5,750 - £6,000	£6,402	£8,176	£10,026	£12,298	£15,087	135.7%
	£/square foot		£595	£760	£931	£1,143	£1,402	
SOUTHSEA TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,064	£5,181	£6,345	£7,772	£9,521	134.3%
	£/square foot		£378	£481	£589	£722	£885	
SOUTHAMPTON CITY CENTRE	£/square metre	£6,000 - £6,500	£6,746	£8,612	£10,558	£12,946	£15,877	135.4%
	£/square foot		£627	£800	£981	£1,203	£1,475	
NON-TOWN CENTRE COMPARISON GOODS SPACE	£/square metre	£3,000 - £3,500	£4,182	£5,343	£6,555	£8,043	£9,870	136.0%
	£/square foot		£389	£496	£609	£747	£917	

NOTES: (1) Calculated by dividing potential total comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 7:

RESIDUAL SPEND FORECASTS FOR MAIN CENTRES & NON-TOWN CENTRE RETAILING (£ million):

Assumes an annual growth 'efficiency' of: 2.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 2.0% for existing comparison goods floorspace in non-town centre locations

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,386	£6,066	£6,697	£7,394	£8,164
2 Derived Comparison Goods Turnover (£ million):	£111	£125	£138	£153	£169
3 Residual Expenditure (£ million):	£0	£17	£36	£61	£93
FAREHAM TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,712	£6,433	£7,102	£7,841	£8,657
2 Derived Comparison Goods Turnover (£ million):	£187	£210	£232	£256	£283
3 Residual Expenditure (£ million):	£0	£28	£60	£101	£156
GOSPORT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,078	£4,592	£5,070	£5,598	£6,180
2 Derived Comparison Goods Turnover (£ million):	£43	£48	£53	£59	£65
3 Residual Expenditure (£ million):	£0	£6	£14	£23	£35
HAVANT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,362	£4,912	£5,424	£5,988	£6,611
2 Derived Comparison Goods Turnover (£ million):	£50	£56	£62	£69	£76
3 Residual Expenditure (£ million):	£0	£8	£16	£27	£42
PORTSMOUTH CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,402	£7,209	£7,959	£8,788	£9,703
2 Derived Comparison Goods Turnover (£ million):	£304	£342	£378	£417	£460
3 Residual Expenditure (£ million):	£0	£46	£98	£167	£256
SOUTHSEA TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,064	£4,576	£5,053	£5,579	£6,159
2 Derived Comparison Goods Turnover (£ million):	£87	£98	£109	£120	£132
3 Residual Expenditure (£ million):	£0	£13	£28	£47	£72
SOUTHAMPTON CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,746	£7,597	£8,387	£9,260	£10,224
2 Derived Comparison Goods Turnover (£ million):	£734	£827	£913	£1,008	£1,112
3 Residual Expenditure (£ million):	£0	£110	£236	£401	£615
NON-TOWN CENTRE RETAILING					
1 Derived Average Sales Density (£/sq.metre):	£4,182	£4,710	£5,200	£5,741	£6,339
2 Derived Comparison Goods Turnover (£ million):	£883	£994	£1,098	£1,212	£1,338
3 Residual Expenditure (£ million):	£0	£134	£286	£486	£745
TOTAL 'GLOBAL' RESIDUAL EXPENDITURE AVAILABLE TO SUPPORT NEW RETAIL FLOORSPACE (£ million):	£0	£362	£773	£1,313	£2,014

NOTES: (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5). Figures in later years based on the base year with an allowance for annual growth as specified.
 (2) Turnover derived by multiplying the average sales density multiplied by the floorspace for the location.
 (3) Residual Expenditure is the potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 8: RESIDUAL SPEND CAPACITY MINUS NEW COMMITMENTS

Assumes an annual growth 'efficiency' of: 2.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 2.0% for existing comparison goods floorspace in non-town centre locations

STAGE 8a: ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL FLOORSPACE COMMITMENTS (i.e with planning permission &/or under construction)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
FAREHAM TOWN CENTRE					
1 Sales area (square metres):	0	10,087	10,087	10,087	10,087
2 Potential average sales density (£ per square metre):	£5,000	£5,631	£6,217	£6,864	£7,578
3 Potential turnover (£ million)	£0.00	£56.80	£62.71	£69.23	£76.44
GOSPORT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
HAVANT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£3,000	£3,378	£3,730	£4,118	£4,547
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
PORTSMOUTH CITY CENTRE					
1 Sales area (square metres):	0	1,717	1,717	1,717	1,717
2 Potential average sales density (£ per square metre):	£5,500	£6,194	£6,839	£7,550	£8,336
3 Potential turnover (£ million)	£0.00	£10.63	£11.74	£12.96	£14.31
SOUTHSEA TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
SOUTHAMPTON CITY CENTRE					
1 Sales area (square metres):	0	5,371	5,371	5,371	5,371
2 Potential average sales density (£ per square metre):	£6,000	£6,757	£7,460	£8,237	£9,094
3 Potential turnover (£ million)	£0.00	£36.29	£40.07	£44.24	£48.84
NON-TOWN CENTRE COMPARISON GOODS SPACE					
1 Sales area (square metres):	0	17,230	17,230	17,230	17,230
2 Potential average sales density (£ per square metre):	£3,000	£3,378	£3,730	£4,118	£4,547
3 Potential turnover (£ million)	£0.00	£58.21	£64.27	£70.96	£78.34
4. TOTAL ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL COMMITMENTS (£ million):	£0	£161.9	£178.8	£197.4	£217.9
5. REVISED 'GLOBAL' RESIDUAL COMPARISON GOODS SPEND (£ million):	£0	£199.7	£594.5	£1,115.9	£1,796.5

STAGE 8b: FORECAST 'GLOBAL' FLOORSPACE CAPACITY (net square metres)

	2005	2011	2016	2021	2026
OPTION 1: Assume average sales density of new floorspace of £4,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£4,000	£4,505	£4,973	£5,491	£6,063
2 Supportable net floorspace (square metres) ⁽²⁾ :	0	44,300	119,500	203,200	296,300
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	55,375	149,375	264,000	370,375
OPTION 2: Assume average sales density of new floorspace of £6,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£6,000	£6,757	£7,460	£8,237	£9,094
2 Supportable new floorspace (net sq m) ⁽²⁾ :	0	29,600	79,700	135,500	197,500
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	37,000	99,625	169,375	246,875

NOTES:

- (1) Source: PUSH Authorities - see Appendices 27 - 2f for detailed tables
- (2) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace.
- (3) Assume a net/gross ratio for new floorspace of 75%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2a: Lower Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 9: Leisure Capacity Assessment (A3 / A4 / A5 Use Classes)

	2005	2011	2016	2021	2026
OPTION 1: <u>Assume average sales density of new retail floorspace of £4,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	44,300	119,500	203,200	296,300
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	8,860	23,900	40,640	59,260
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	13,290	35,850	60,960	88,890
OPTION 2: <u>Assume average sales density of new retail floorspace of £6,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	29,600	79,700	135,500	197,500
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	5,920	15,940	27,100	39,500
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	8,880	23,910	40,650	59,250

APPENDIX 24
COMPARISON GOODS RETAIL CAPACITY
ASSESSMENT SCENARIO 2(B)



Re:Map

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)**Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth**

Assumptions: Constant market shares (2005 - 2026)

Increase in turnover 'efficiency' (or 'productivity') of existing retail businesses of 2% per annum

Projected growth in average spend of 4.8% per annum

Original: 11-Nov-2005
Revised: 15-Dec-2005**STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING** (all monetary figures expressed in constant 2001 prices):

CORE LOCAL AUTHORITY AREA	2001	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
							£m	%
EASTLEIGH BOROUGH COUNCIL								
- Population ⁽¹⁾	116,276	119,709	125,048	129,680	134,483	139,464		16.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,579	£3,519	£4,663	£5,895	£7,452	£9,420		167.7%
- Total Available Spend (£million)	£299.9	£421.3	£583.1	£764.4	£1,002.1	£1,313.8	£892	211.8%
FAREHAM BOROUGH COUNCIL								
- Population ⁽¹⁾	107,808	110,463	114,568	118,105	121,751	125,510		13.6%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,610	£3,562	£4,719	£5,965	£7,541	£9,533		167.7%
- Total Available Spend (£million)	£281.4	£393.4	£540.6	£704.5	£918.2	£1,196.5	£803	204.1%
GOSPORT BOROUGH COUNCIL								
- Population ⁽¹⁾	76,004	75,974	75,928	75,890	75,852	75,814		-0.2%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,436	£3,324	£4,404	£5,568	£7,038	£8,898		167.7%
- Total Available Spend (£million)	£185.1	£252.6	£334.4	£422.5	£533.9	£674.6	£422	167.1%
HAVANT BOROUGH COUNCIL								
- Population ⁽¹⁾	116,814	117,470	118,460	119,291	120,129	120,972		3.0%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,364	£3,226	£4,274	£5,403	£6,830	£8,635		167.7%
- Total Available Spend (£million)	£276.1	£379.0	£506.3	£644.5	£820.5	£1,044.6	£666	175.6%
PORTSMOUTH CITY COUNCIL								
- Population ⁽¹⁾	186,479	189,028	192,917	196,219	199,578	202,994		7.4%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,358	£3,218	£4,263	£5,389	£6,813	£8,613		167.7%
- Total Available Spend (£million)	£439.7	£608.3	£822.4	£1,057.5	£1,359.7	£1,748.4	£1,140	187.4%
SOUTHAMPTON CITY COUNCIL								
- Population ⁽¹⁾	217,497	218,107	219,024	219,792	220,562	221,335		1.5%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,279	£3,110	£4,120	£5,209	£6,585	£8,324		167.7%
- Total Available Spend (£million)	£495.7	£678.3	£902.5	£1,144.9	£1,452.4	£1,842.5	£1,164	171.6%
CORE AREA - ALL LOCAL AUTHORITIES:								
TOTAL POPULATION	820,878	830,749	845,945	858,977	872,355	886,089		6.7%
TOTAL AVAILABLE COMPARISON GOODS SPEND (£ million)	£1,977.9	£2,732.8	£3,689.3	£4,738.4	£6,086.8	£7,820.3		186.2%
OUTER AREA - Rest of PUSH Region								
- Population ⁽¹⁾	162,029	166,151	172,531	178,035	183,714	189,574		14.1%
- Average comparison goods spending (£ per capita) ^{(2) (3)}	£2,598	£3,545	£4,697	£5,938	£7,507	£9,490		167.7%
- Total Available Spend (£million)	£421.0	£589.1	£810.4	£1,057.2	£1,379.1	£1,799.0	£1,210	205.4%
TOTAL PUSH SUB-REGION								
- Total Population ⁽¹⁾	982,907	996,900	1,018,477	1,037,012	1,056,069	1,075,663		7.9%
- Total Available Comparison Goods Spend £m	£2,399	£3,322	£4,500	£5,796	£7,466	£9,619		189.6%

NOTES:

- (1) 2001 population figures derived from DTZ's in-house MapInfo TargetPro GIS dataset and based on 2001 Census data. Population projections have been derived from Hampshire County Council and agreed with PUSH
- (2) 2001 average spend per capita estimates derived from MapInfo TargetPro GIS dataset. Actual growth rates of +9.6% for 2001/02, +8.7% for 2002/03 and +9.3% for 2003/04 are based on MapInfo Information Brief 05/02.
- Projections from 2004 onwards based on the "long term" comparison goods growth rate of 4.8% p.a. as set out in MapInfo Information Brief 05/02.
- (3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates at this stage (see ReMap: Stage 3).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 2a: EXISTING TOWN CENTRE FLOORSPACE STOCK - MAIN CENTRES & NON-TOWN CENTRE RETAILING (net square metres):

CORE LOCAL AUTHORITY AREA	Total Floorspace (net square metres)				
	2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL					
MAIN CENTRE: Eastleigh	20,660	20,660	20,660	20,660	20,660
Non-Town Centre	60,375	60,375	60,375	60,375	60,375
FAREHAM BOROUGH COUNCIL					
MAIN CENTRE: Fareham	32,660	32,660	32,660	32,660	32,660
Non-Town Centre	31,889	31,889	31,889	31,889	31,889
GOSPORT BOROUGH COUNCIL					
MAIN CENTRE: Gosport	10,481	10,481	10,481	10,481	10,481
Non-Town Centre	3,526	3,526	3,526	3,526	3,526
HAVANT BOROUGH COUNCIL					
MAIN CENTRE: Havant	11,447	11,447	11,447	11,447	11,447
Non-Town Centre	54,543	54,543	54,543	54,543	54,543
PORTSMOUTH CITY COUNCIL					
MAIN CENTRE: Portsmouth	47,448	47,448	47,448	47,448	47,448
OTHER CENTRE: Southsea	21,488	21,488	21,488	21,488	21,488
Non-Town Centre	50,239	50,239	50,239	50,239	50,239
SOUTHAMPTON CITY COUNCIL					
MAIN CENTRE: Southampton	108,801	108,801	108,801	108,801	108,801
Non-Town Centre	10,539	10,539	10,539	10,539	10,539
TOTAL COMPARISON GOODS FLOORSPACE (net square metres)					
MAIN CENTRES	252,985	252,985	252,985	252,985	252,985
NON-TOWN CENTRE	211,111	211,111	211,111	211,111	211,111
TOTAL NON-FOOD FLOORSPACE	464,096	464,096	464,096	464,096	464,096

SOURCE: All floorspace estimates at the base year have been agreed with the relevant local authorities. See [Appendices 25 - 26](#) for a more detailed explanation on data sources.

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 2b: RETAIL FLOORSPACE COMMITMENTS - WITH PLANNING PERMISSION OR UNDER CONSTRUCTION AT NOVEMBER 2005 (net square metres) :

	Total Commitments (gross sq.m)	Total Floorspace in Pipeline (net sq.m.)				
		2005	2011	2016	2021	2026
EASTLEIGH BOROUGH COUNCIL						
MAIN CENTRE: Eastleigh	--	0	0	0	0	0
Non-Town Centre Retailing ⁽¹⁾ :	3,652	0	2,739	2,739	2,739	2,739
FAREHAM BOROUGH COUNCIL						
MAIN CENTRE: Fareham ⁽²⁾	13,449	0	10,087	10,087	10,087	10,087
Non-Town Centre Retailing	--	0	0	0	0	0
GOSPORT BOROUGH COUNCIL						
MAIN CENTRE: Gosport	--	0	0	0	0	0
Non-Town Centre Retailing ⁽³⁾ :	1,470	0	1,103	1,103	1,103	1,103
HAVANT BOROUGH COUNCIL						
MAIN CENTRE: Havant	0	0	0	0	0	0
Non-Town Centre Retailing ⁽⁴⁾ :	13,433	0	10,075	10,075	10,075	10,075
PORTSMOUTH CITY COUNCIL						
MAIN CENTRE: Portsmouth City Centre ⁽⁵⁾	2,289	0	1,717	1,717	1,717	1,717
Southsea	--	0	0	0	0	0
Non-Town Centre Retailing ⁽⁶⁾ :	4,418	0	3,314	3,314	3,314	3,314
SOUTHAMPTON CITY COUNCIL						
MAIN CENTRE: Southampton City Centre ⁽⁷⁾ :	7,161	0	5,371	5,371	5,371	5,371
Non-Town Centre Retailing:	--	0	0	0	0	0
TOTAL COMPARISON GOODS FLOORSPACE COMMITMENTS (net square metres)						
	Town Centre Floorspace:	0	17,174	17,174	17,174	17,174
	Non-Town Centre Retail Floorspace:	0	17,230	17,230	17,230	17,230
	TOTAL FLOORSPACE IN THE PIPELINE:	0	34,404	34,404	34,404	34,404

SOURCE: All floorspace commitments have been agreed with the relevant local authorities. See Appendices 27 - 28 for a more detailed explanation on data sources.
Sales areas derived by applying a gross to net ratio of 75%.

- NOTES: (1) Extension to Hedge End
(2) Market Quay Phase 3 development and others.
(3) Royal Clarence Yard and Cherque Farm developments
(4) Brockhampton Lane and Potash Terrace retail warehouse schemes.
(5) Commercial Road - new 3-storey development to include retail
(6) Gunwharf Quays and Fratton Road schemes
(7) Carlton Terrace redevelopment and other schemes



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend derived from PUSH sub-region)

CORE LOCAL AUTHORITY AREA		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	2.8%	3.5%	3.5%	3.5%	3.5%	3.5%
To Fareham Town Centre	12.4%	6.0%	6.0%	6.0%	6.0%	6.0%
To Gosport Town Centre	2.3%	1.5%	1.5%	1.5%	1.5%	1.5%
To Havant Town Centre	4.1%	1.5%	1.5%	1.5%	1.5%	1.5%
To Portsmouth City Centre	12.0%	9.0%	9.0%	9.0%	9.0%	9.0%
To Southsea Town Centre	1.4%	3.0%	3.0%	3.0%	3.0%	3.0%
To Southampton City Centre	16.7%	21.0%	21.0%	21.0%	21.0%	21.0%
To non-Town Centre Retailing	32.1%	27.0%	27.0%	27.0%	27.0%	27.0%
To other major shop locations and stores elsewhere	15.0%	20.5%	20.5%	20.5%	20.5%	20.5%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	1.3%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

OUTER AREA - Rest of PUSH Region		2005	2011	2016	2021	2026
	Survey-based Market Shares %	DTZ Adjustments				
To Eastleigh Town Centre	1.4%	1.5%	1.5%	1.5%	1.5%	1.5%
To Fareham Town Centre	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
To Gosport Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
To Havant Town Centre	6.3%	1.0%	1.0%	1.0%	1.0%	1.0%
To Portsmouth City Centre	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
To Southsea Town Centre	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%
To Southampton City Centre	9.5%	9.5%	9.5%	9.5%	9.5%	9.5%
To non-Town Centre Retailing	17.8%	18.5%	18.5%	18.5%	18.5%	18.5%
To other major shop locations and stores elsewhere	55.2%	55.2%	55.2%	55.2%	55.2%	55.2%
To Special Forms of Trading (e.g. Internet, Mail Order, etc.)	2.5%	7.0%	7.0%	7.0%	7.0%	7.0%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside the PUSH sub-region)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
Trade Draw from Core Area	85%	85%	85%	85%	85%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
FAREHAM TOWN CENTRE					
Trade Draw from Core Area	87%	87%	87%	87%	87%
Trade Draw from Rest of PUSH Area	6%	6%	6%	6%	6%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
GOSPORT TOWN CENTRE					
Trade Draw from Core Area	95%	95%	95%	95%	95%
Trade Draw from Rest of PUSH Area	0%	0%	0%	0%	0%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
HAVANT TOWN CENTRE					
Trade Draw from Core Area	81%	81%	81%	81%	81%
Trade Draw from Rest of PUSH Area	12%	12%	12%	12%	12%
Trade Draw from Elsewhere (DTZ estimate)	7%	7%	7%	7%	7%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
PORTSMOUTH CITY CENTRE					
Trade Draw from Core Area	80%	80%	80%	80%	80%
Trade Draw from Rest of PUSH Area	10%	10%	10%	10%	10%
Trade Draw from Elsewhere (DTZ estimate)	10%	10%	10%	10%	10%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHSEA TOWN CENTRE					
Trade Draw from Core Area	93%	93%	93%	93%	93%
Trade Draw from Rest of PUSH Area	2%	2%	2%	2%	2%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
SOUTHAMPTON CITY CENTRE					
Trade Draw from Core Area	77%	77%	77%	77%	77%
Trade Draw from Rest of PUSH Area	8%	8%	8%	8%	8%
Trade Draw from Elsewhere (DTZ estimate)	15%	15%	15%	15%	15%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
NON-TOWN CENTRE COMPARISON GOODS SPACE					
Trade Draw from Core Area	83%	83%	82%	82%	82%
Trade Draw from Rest of PUSH Area	12%	12%	13%	13%	13%
Trade Draw from Elsewhere (DTZ estimate)	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 5: POTENTIAL TURNOVER OF THE MAIN CENTRES AND NON-TOWN CENTRE COMPARISON GOODS SPACE (£ million):

	2005	2011	2016	2021	2026	CHANGE: 2005 - 2026	
						£m	%
EASTLEIGH TOWN CENTRE							
Derived Turnover from Core Area	£95.6	£129.1	£165.8	£213.0	£273.7		
Derived Turnover from Rest of PUSH Area	£8.8	£12.2	£15.9	£20.7	£27.0		
Turnover from Elsewhere	£7.9	£10.6	£13.7	£17.6	£22.6		
TOTAL TURNOVER	£112.4	£151.9	£195.4	£251.3	£323.3	£210.98	187.8%
FAREHAM TOWN CENTRE							
Derived Turnover from Core Area	£164.0	£221.4	£284.3	£365.2	£469.2		
Derived Turnover from Rest of PUSH Area	£11.2	£15.4	£20.1	£26.2	£34.2		
Turnover from Elsewhere	£13.2	£17.8	£22.9	£29.5	£37.9		
TOTAL TURNOVER	£188.3	£254.6	£327.3	£420.9	£541.3	£352.94	187.4%
GOSPORT TOWN CENTRE							
Derived Turnover from Core Area	£41.0	£55.3	£71.1	£91.3	£117.3		
Derived Turnover from Rest of PUSH Area	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Elsewhere	£2.2	£2.9	£3.7	£4.8	£6.2		
TOTAL TURNOVER	£43.2	£58.3	£74.8	£96.1	£123.5	£80.33	186.2%
HAVANT TOWN CENTRE							
Derived Turnover from Core Area	£41.0	£55.3	£71.1	£91.3	£117.3		
Derived Turnover from Rest of PUSH Area	£5.9	£8.1	£10.6	£13.8	£18.0		
Turnover from Elsewhere	£3.5	£4.8	£6.1	£7.9	£10.2		
TOTAL TURNOVER	£50.4	£68.2	£87.8	£113.0	£145.5	£95.07	188.6%
PORTSMOUTH CITY CENTRE							
Derived Turnover from Core Area	£246.0	£332.0	£426.5	£547.8	£703.8		
Derived Turnover from Rest of PUSH Area	£30.0	£41.3	£53.9	£70.3	£91.7		
Turnover from Elsewhere	£30.7	£41.5	£53.4	£68.7	£88.4		
TOTAL TURNOVER	£306.7	£414.9	£533.7	£686.8	£884.0	£577.31	188.3%
SOUTHSEA TOWN CENTRE							
Derived Turnover from Core Area	£82.0	£110.7	£142.2	£182.6	£234.6		
Derived Turnover from Rest of PUSH Area	£1.8	£2.4	£3.2	£4.1	£5.4		
Turnover from Elsewhere	£4.4	£6.0	£7.6	£9.8	£12.6		
TOTAL TURNOVER	£88.2	£119.1	£153.0	£196.6	£252.6	£164.48	186.6%
SOUTHAMPTON CITY CENTRE							
Derived Turnover from Core Area	£573.9	£774.7	£995.1	£1,278.2	£1,642.3		
Derived Turnover from Rest of PUSH Area	£56.0	£77.0	£100.4	£131.0	£170.9		
Turnover from Elsewhere	£111.2	£150.3	£193.3	£248.7	£320.0		
TOTAL TURNOVER	£741.0	£1,002.0	£1,288.8	£1,657.9	£2,133.1	£1,392.14	187.9%
NON-TOWN CENTRE COMPARISON GOODS SPACE							
Derived Turnover from Core Area	£737.9	£996.1	£1,279.4	£1,643.4	£2,111.5		
Derived Turnover from Rest of PUSH Area	£109.0	£149.9	£195.6	£255.1	£332.8		
Turnover from Elsewhere	£44.6	£60.3	£77.6	£99.9	£128.6		
TOTAL TURNOVER	£891.4	£1,206.3	£1,552.6	£1,998.5	£2,573.0	£1,681.53	188.6%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE							
Derived Turnover from Core Area	£560.2	£756.3	£971.4	£1,247.8	£1,603.2	£1,042.94	186.2%
Derived Turnover from Rest of PUSH Area	£325.2	£447.3	£583.6	£761.2	£993.0	£667.87	205.4%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING							
Derived Turnover from Core Area	£191.3	£258.2	£331.7	£426.1	£547.4	£356.12	186.2%
Derived Turnover from Rest of PUSH Area	£41.2	£56.7	£74.0	£96.5	£125.9	£84.69	205.4%
PUSH SUB-REGION: TOTAL POTENTIAL TURNOVER (£ million) ⁽¹⁾							
Turnover from Core Area (all Local Authorities)	£2,732.8	£3,689.3	£4,738.4	£6,086.8	£7,820.3		186.2%
Turnover from Rest of PUSH Sub-Region	£589.1	£810.4	£1,057.2	£1,379.1	£1,799.0		205.4%

NOTES: Turnover from elsewhere represents all spend derived from shoppers and visitors to centres from outside the Core and Rest of PUSH Sub-Region. Based on DTZ judgement of relative attraction and catchment of centres.



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		<u>DTZ Benchmark</u>	2005	2011	2016	2021	2026	
EASTLEIGH TOWN CENTRE	£/square metre	£5,000 - £5,250	£5,438	£7,353	£9,457	£12,164	£15,650	187.8%
	£/square foot		£505	£683	£879	£1,130	£1,454	
FAREHAM TOWN CENTRE	£/square metre	£5,250 - £5,500	£5,767	£7,795	£10,021	£12,886	£16,574	187.4%
	£/square foot		£536	£724	£931	£1,197	£1,540	
GOSPORT TOWN CENTRE	£/square metre	£3,500 - £3,750	£4,117	£5,558	£7,138	£9,170	£11,781	186.2%
	£/square foot		£382	£516	£663	£852	£1,095	
HAVANT TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,404	£5,960	£7,669	£9,872	£12,709	188.6%
	£/square foot		£409	£554	£713	£917	£1,181	
PORTSMOUTH CITY CENTRE	£/square metre	£5,750 - £6,000	£6,463	£8,743	£11,249	£14,475	£18,630	188.3%
	£/square foot		£600	£812	£1,045	£1,345	£1,731	
SOUTHSEA TOWN CENTRE	£/square metre	£3,750 - £4,000	£4,103	£5,541	£7,119	£9,148	£11,757	186.6%
	£/square foot		£381	£515	£661	£850	£1,092	
SOUTHAMPTON CITY CENTRE	£/square metre	£6,000 - £6,500	£6,811	£9,210	£11,846	£15,238	£19,606	187.9%
	£/square foot		£633	£856	£1,100	£1,416	£1,821	
NON-TOWN CENTRE COMPARISON GOODS SPACE	£/square metre	£3,000 - £3,500	£4,223	£5,714	£7,354	£9,467	£12,188	188.6%
	£/square foot		£392	£531	£683	£879	£1,132	

NOTES: (1) Calculated by dividing potential total comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

STAGE 7: RESIDUAL SPEND FORECASTS FOR MAIN CENTRES & NON-TOWN CENTRE RETAILING (£ million):

Assumes an annual growth 'efficiency' of: 2.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 2.0% for existing comparison goods floorspace in non-town centre locations

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,438	£6,124	£6,762	£7,465	£8,242
2 Derived Comparison Goods Turnover (£ million):	£112	£127	£140	£154	£170
3 Residual Expenditure (£ million):	£0	£25	£56	£97	£153
FAREHAM TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£5,767	£6,494	£7,170	£7,917	£8,741
2 Derived Comparison Goods Turnover (£ million):	£188	£212	£234	£259	£285
3 Residual Expenditure (£ million):	£0	£42	£93	£162	£256
GOSPORT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,117	£4,636	£5,119	£5,652	£6,240
2 Derived Comparison Goods Turnover (£ million):	£43	£49	£54	£59	£65
3 Residual Expenditure (£ million):	£0	£10	£21	£37	£58
HAVANT TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,404	£4,960	£5,476	£6,046	£6,675
2 Derived Comparison Goods Turnover (£ million):	£50	£57	£63	£69	£76
3 Residual Expenditure (£ million):	£0	£11	£25	£44	£69
PORTSMOUTH CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,463	£7,279	£8,036	£8,873	£9,796
2 Derived Comparison Goods Turnover (£ million):	£307	£345	£381	£421	£465
3 Residual Expenditure (£ million):	£0	£69	£152	£266	£419
SOUTHSEA TOWN CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£4,103	£4,620	£5,101	£5,632	£6,218
2 Derived Comparison Goods Turnover (£ million):	£88	£99	£110	£121	£134
3 Residual Expenditure (£ million):	£0	£20	£43	£76	£119
SOUTHAMPTON CITY CENTRE					
1 Derived Average Sales Density (£/sq.metre):	£6,811	£7,670	£8,468	£9,350	£10,323
2 Derived Comparison Goods Turnover (£ million):	£741	£834	£921	£1,017	£1,123
3 Residual Expenditure (£ million):	£0	£168	£367	£641	£1,010
NON-TOWN CENTRE RETAILING					
1 Derived Average Sales Density (£/sq.metre):	£4,223	£4,755	£5,250	£5,797	£6,400
2 Derived Comparison Goods Turnover (£ million):	£891	£1,004	£1,108	£1,224	£1,351
3 Residual Expenditure (£ million):	£0	£202	£444	£775	£1,222
TOTAL 'GLOBAL' RESIDUAL EXPENDITURE AVAILABLE TO SUPPORT NEW RETAIL FLOORSPACE (£ million):	£0	£548	£1,203	£2,097	£3,306

NOTES: (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5). Figures in later years based on the base year with an allowance for annual growth as specified.
 (2) Turnover derived by multiplying the average sales density multiplied by the floorspace for the location.
 (3) Residual Expenditure is the potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7).



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 8: RESIDUAL SPEND CAPACITY MINUS NEW COMMITMENTS

Assumes an annual growth 'efficiency' of: 2.0% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 2.0% for existing comparison goods floorspace in non-town centre locations

STAGE 8a: ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL FLOORSPACE COMMITMENTS (i.e with planning permission &/or under construction)

	2005	2011	2016	2021	2026
EASTLEIGH TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
FAREHAM TOWN CENTRE					
1 Sales area (square metres):	0	10,087	10,087	10,087	10,087
2 Potential average sales density (£ per square metre):	£5,000	£5,631	£6,217	£6,864	£7,578
3 Potential turnover (£ million)	£0.00	£56.80	£62.71	£69.23	£76.44
GOSPORT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
HAVANT TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£3,000	£3,378	£3,730	£4,118	£4,547
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
PORTSMOUTH CITY CENTRE					
1 Sales area (square metres):	0	1,717	1,717	1,717	1,717
2 Potential average sales density (£ per square metre):	£5,500	£6,194	£6,839	£7,550	£8,336
3 Potential turnover (£ million)	£0.00	£10.63	£11.74	£12.96	£14.31
SOUTHSEA TOWN CENTRE					
1 Sales area (square metres):	0	0	0	0	0
2 Potential average sales density (£ per square metre):	£0	£0	£0	£0	£0
3 Potential turnover (£ million)	£0.00	£0.00	£0.00	£0.00	£0.00
SOUTHAMPTON CITY CENTRE					
1 Sales area (square metres):	0	5,371	5,371	5,371	5,371
2 Potential average sales density (£ per square metre):	£6,000	£6,757	£7,460	£8,237	£9,094
3 Potential turnover (£ million)	£0.00	£36.29	£40.07	£44.24	£48.84
NON-TOWN CENTRE COMPARISON GOODS SPACE					
1 Sales area (square metres):	0	17,230	17,230	17,230	17,230
2 Potential average sales density (£ per square metre):	£3,000	£3,378	£3,730	£4,118	£4,547
3 Potential turnover (£ million)	£0.00	£58.21	£64.27	£70.96	£78.34
4. TOTAL ESTIMATED POTENTIAL TURNOVER OF NEW RETAIL COMMITMENTS (£ million):	£0	£161.9	£178.8	£197.4	£217.9
5. REVISED 'GLOBAL' RESIDUAL COMPARISON GOODS SPEND (£ million):	£0	£386.3	£1,023.7	£1,899.5	£3,088.1

STAGE 8b: FORECAST 'GLOBAL' FLOORSPACE CAPACITY (net square metres)

	2005	2011	2016	2021	2026
OPTION 1: Assume average sales density of new floorspace of £4,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£4,000	£4,505	£4,973	£5,491	£6,063
2 Supportable net floorspace (square metres) ⁽²⁾ :	0	85,800	205,800	345,900	509,400
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	107,250	257,250	432,375	636,750
OPTION 2: Assume average sales density of new floorspace of £6,000 per square metre					
1 Assumed sales density of new floorspace (£ per sq m):	£6,000	£6,757	£7,460	£8,237	£9,094
2 Supportable new floorspace (net sq m) ⁽²⁾ :	0	57,200	137,200	230,600	339,600
3 Supportable gross floorspace (square metres) ⁽³⁾ :	0	71,500	171,500	288,250	424,500

NOTES:

- (1) Source: PUSH Authorities - see Appendices 27 - 2f for detailed tables
- (2) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace.
- (3) Assume a net/gross ratio for new floorspace of 75%



COMPARISON GOODS RETAIL CAPACITY ASSESSMENT: PUSH SUB-REGION (2005 - 2026)

Scenario 2b: Higher Expenditure Growth & Higher Turnover 'Efficiency' Growth

STAGE 9: Leisure Capacity Assessment (A3 / A4 / A5 Use Classes)

	2005	2011	2016	2021	2026
OPTION 1: <u>Assume average sales density of new retail floorspace of £4,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	85,800	205,800	345,900	509,400
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	17,160	41,160	69,180	101,880
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	25,740	61,740	103,770	152,820
OPTION 2: <u>Assume average sales density of new retail floorspace of £6,000 per square metre</u>					
1 Forecast retail floorspace capacity (net square metres)	0	57,200	137,200	230,600	339,600
2 A3 / A4 / A5 Uses equivalent to 20% of total retail capacity (sq.m net)	0	11,440	27,440	46,120	67,920
3 A3 / A4 / A5 Uses equivalent to 30% of total retail capacity (sq.m net)	0	17,160	41,160	69,180	101,880

APPENDIX 25
COMPARISON GOODS FLOORSPACE IN-
CENTRE

Existing Town Centre Floorspace: Comparison Goods

Local Authority	Centre	Store	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)
Fareham Borough Council	Fareham Shopping Centre	Fareham Shopping Centre	31000	N/A	24800
	Fareham Town Centre	Other town centre shops	11000	N/A	7700
	Fareham Town Centre	Comparison Goods Floorspace in food stores	N/A	N/A	160
SUB-TOTAL					32660
Havant Borough Council	Havant Town Centre	Town Centre	N/A	N/A	11236
	Havant Town Centre	Comparison Goods Floorspace in food stores	N/A	N/A	211
SUB-TOTAL					11447
Portsmouth City Council	Portsmouth City Centre	Town Centre	72307	N/A	47000
	Portsmouth City Centre	Comparison Goods Floorspace in food stores	N/A	N/A	448
	Southsea Town Centre	Town Centre	33058	N/A	21488
	Southsea Town Centre	Comparison Goods Floorspace in food stores	N/A	N/A	0
SUB-TOTAL					68936
Gosport Borough Council	Gosport Town Centre	Town Centre	14856	70	10399
	Gosport Town Centre	Comparison Goods Floorspace in food stores	N/A	N/A	82
SUB-TOTAL					10481
Eastleigh Borough Council	Eastleigh Town Centre	Town Centre	28813	70	20169
	Eastleigh Town Centre	Comparison Goods Floorspace in food stores	N/A	N/A	491
SUB-TOTAL					20660
Southampton City Council	Southampton City Centre	City Centre	151,000	70	105700
	Southampton City Centre	Comparison Goods Floorspace in food stores	N/A	N/A	3101
SUB-TOTAL					108801

APPENDIX 26
COMPARISON GOODS FLOORSPACE OUT-OF-
CENTRE

Existing Non-Town Centre Floorspace: Comparison Goods						
Local Authority	Centre / Scheme	Store	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)	
Fareham Borough Council	Retail Warehouses	Homebase	3400	88%	3000	
	Retail Warehouses	Wickes	2400	92%	2200	
	Retail Warehouses	Bed-E-Buys	500	90%	450	
	Retail Warehouses	Furniture Express	400	88%	350	
	Retail Warehouses	Flooring Depot	500	90%	450	
	Retail Warehouses	Tiles R Us	700	86%	600	
	Retail Warehouses	Focus DIY	2300	91%	2100	
	Retail Warehouses	Allied Carpets	2200	86%	1900	
	Retail Warehouses	Harveys	2200	86%	1900	
	Retail Warehouses	Argos Extra	2400	50%	1200	
	Retail Warehouses	Haskers	1300	85%	1100	
	Retail Warehouses	B&Q	4500	89%	4000	
	Retail Warehouses	Carpet Right	1700	82%	1400	
	Retail Warehouses	Pet Smart	700	86%	600	
	Retail Warehouses	Corret	1000	80%	800	
	Retail Warehouses	Halfords	1400	79%	1100	
	Retail Warehouses	Currys	3300	85%	2800	
	Retail Warehouses	MFI Homeworks	2800	86%	2400	
	Retail Warehouses	Staples	1800	83%	1500	
		Comparison Goods Floorspace in Non-Town Centre Foodstores	N/A	N/A	N/A	2039
				SUB-TOTAL	31889	
Havant BC	Hambleton Retail Park	TK Maxx	1885	80	1508	
	Hambleton Retail Park	JJB Sports	9544	80	7635	
	Hambleton Retail Park	Carpetright	9005	80	7204	
	Hambleton Retail Park	Powerhouse	9005	80	7204	
	Hambleton Retail Park	Shoe City	9005	80	7204	
	Hambleton Retail Park	Matalan	2980	80	2384	
	Hambleton Retail Park	Focus DIY	2330	80	1864	
	Hambleton Retail Park	Unknown Furniture Retailer	2583	80	2066	
	Solus	B & Q	N/A	N/A	6610	
	Solus	Haying Hardware	N/A	N/A	554	
	Solus	Country Garden Centre	N/A	N/A	3019	
	Solus	Homebase	N/A	N/A	2511	
		Comparison Goods Floorspace in Non-Town Centre Foodstores	N/A	N/A	N/A	4780
					SUB-TOTAL	54543
Portsmouth City Council	Farlington	Homebase	3036	85%	2581	
	Hilsea	MFI	4766	85%	4051	
	Ocean Park/Burrfields Road	Toys R Us	3764	85%	3199	
	Ocean Park/Burrfields Road	Carpet Right	1885	85%	1602	
	Ocean Park/Burrfields Road	Comet	929	85%	790	
	Ocean Park/Burrfields Road	Homebase	4027	85%	3423	
	Ocean Park/Burrfields Road	Halfords	1003	85%	853	
	Ocean Park/Burrfields Road	Currys	933	85%	793	
	Ocean Park/Burrfields Road	PC World	3359	85%	2855	
	Ocean Park/Burrfields Road	Pets at Home	929	85%	790	
	Ocean Park/Burrfields Road	Staples	1394	85%	1185	
	Pompey Centre, Fratton	B & Q	12292	85%	10448	
	Victory Retail Park	Office World	929	85%	790	
	Victory Retail Park	Allied Carpets	929	85%	790	
	Victory Retail Park	Poundstretcher	698	85%	593	
	Victory Retail Park	Harveys	929	85%	790	
	Victory Retail Park	Rosebys	698	85%	593	
	Victory Retail Park	Dreams	418	85%	355	
	Nonway Road, Portsmouth	Haskers	N/A	N/A	2600	
	Gunwharf Quays	Town Centre	15654	N/A	8472	
Gunwharf Quays	Comparison Goods Floorspace	N/A	N/A	0		
	Comparison Goods Floorspace in Non-Town Centre Foodstores	N/A	N/A	N/A	2686	
				SUB-TOTAL	50239	
Gosport Borough Council	The Range, 1 Gunners Way, Brockhurst Industrial Estate, Gosport	N/A	4408	80	3528	
	Comparison Goods Floorspace in Non-Town Centre Foodstores	N/A	N/A	N/A	0	
				SUB-TOTAL	3528	

Existing Non-Town Centre Floorspace: Comparison Goods						
Local Authority	Centre / Scheme	Store	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)	
Eastleigh Borough Council	School Lane, Chandlers Ford Industrial Estate	Peter Green	3298	80	2638	
	Woodside Avenue, Boyott Wood, Eastleigh	Charlie Browns	743	80	594	
	Woodside Avenue, Boyott Wood, Eastleigh	B&Q	5110	80	4088	
	Turnpike Trading Estate, Cheshnut Avenue/Faulkland Road, Eastleigh	Nevada Bob's	743	80	594	
	Turnpike Trading Estate, Cheshnut Avenue/Faulkland Road, Eastleigh	Homebase	4645	80	3716	
	Channon Retail Park, Woodside Avenue, Boyott Wood, Eastleigh	Halfords	1115	80	892	
	Channon Retail Park, Woodside Avenue, Boyott Wood, Eastleigh	Comet	1068	80	854	
	Channon Retail Park, Woodside Avenue, Boyott Wood, Eastleigh	Matalan	5388	80	4310	
	Twyford Road, Eastleigh	Magnet	1651	80	1321	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Powerstore	929	80	743	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Carpetright	929	80	743	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Great Mills	3623	80	2898	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Kingsbury	994	80	795	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Furnitureland	3832	80	3066	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Harveys	914	80	731	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	M&S (non-food)	N/A	N/A	7107	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	B&Q	9294	80	7435	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Halfords	1394	80	1115	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Courts	3356	80	2685	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Currys	1900	80	1520	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	PC World	2502	80	2002	
	Hedge End Retail Park, J7, M27 (also referred to as Charles Watts Way/Tollbar Way/Botley Road)	Homebase	3705	80	2964	
	Comparison Goods Floorspace in Non-Town Centre Foodstores	N/A	N/A	N/A	7561	
					SUB-TOTAL	60375

Existing Non-Town Centre Floorspace: Comparison Goods						
Local Authority	Centre / Scheme	Store	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)	
Southampton City Council	Millbrook Road	Comet	N/A	N/A	N/A	
		Homebase	N/A	N/A	N/A	
		Sub-Total	4481	80	3584	
	Winchester Road	Vacant (formerly Alders at Horn	4437	80	3550	
		Halfords	670	80	536	
		Currys	N/A	N/A	N/A	
		Pets at Home	N/A	N/A	N/A	
		Vacant Unit	N/A	N/A	N/A	
		Sub-Total	2909	80	2327	
	Comparison Goods Floorspace in Non-Town Centre Foodstores		N/A	N/A	N/A	541
	SUB-TOTAL					10539

APPENDIX 27
COMPARISON GOODS FLOORSPACE
COMMITMENTS IN-CENTRE

Existing Town Centre Floorspace Commitments: Comparison Goods

Local Authority	Centre	Application / Site Reference	Description	Location	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)
Eastleigh BC	None	None	None	None	None	None	None
SUB-TOTAL					0		
Fareham BC	Fareham	Site Reference=003	Phase 3 Market Quay Development, West Street Retail and Leisure Development, Offices and Market Traders	Town-centre	9344	N/A	N/A
	Fareham	Site Reference=024	115 West Street Extension to existing retail unit for storage purposes	Town-centre	1105	N/A	N/A
	Fareham	Site Reference=017	Land at Quay Street, Retail Warehousing. Adjoins the north and east side of Market Quay Roundabout to the east of Market Quay car park.	Town Centre	3000	N/A	N/A
SUB-TOTAL					13449		
Gosport BC	None	None	None	None	None	None	None
SUB-TOTAL					0		
Havant BC	None	None	None	None	None	None	None
SUB-TOTAL					0		
Portsmouth CC	Portsmouth	Site Reference=067	244 - 248D Commercial Road, Craft Market, Gunwharf Quays, Portsmouth. Construction of 3 storey building to form shops. Likely to be comparison goods.	Town-centre	2289	N/A	N/A
SUB-TOTAL					2289		
Southampton CC	Southampton	Site Reference=056	Lords Hill Centre. Previous application to extend store to include customer restaurant. SCC state that current discussions with White Young Green on behalf of British Land / Sainsburys to redevelop whole district centre with assitionla 5,000 sq m compari	Town-centre	5000	N/A	N/A
	Southampton	Site Reference=086	30 Carlton Terrace, Change of use to restaurant and shops & redevelopment to 8 flats.	Town Centre	1111	N/A	N/A
	Portsmouth	Site Reference=078	Portsmouth Shopping Centre. Amalgamation and extensions to retail units.	Town Centre	1050	N/A	N/A
SUB-TOTAL					7161		

APPENDIX 28
COMPARISON GOODS FLOORSPACE
COMMITMENTS OUT-OF-CENTRE

Existing Non-Town Centre Floorspace Commitments: Comparison Goods

Local Authority	Centre	Application / Site Reference	Description	Location	Gross Floorspace (sq.m)	Gross to net ratio	Net Floorspace (sq.m)
Eastleigh BC	Hedge End	Site Reference=037	Charles Watts Way - Extension to existing & subdivision to form 2 retail units.	Out-of-centre	3652	N/A	N/A
SUB-TOTAL					3652		
Fareham BC	None	None	None	None	None	None	None
SUB-TOTAL					0		
Gosport BC	Gosport	App. Reference=K.15500	Royal Clarence Yard - Outline permission. Retail proposed includes 1,620 square metres of A1 floorspace (1320 sqm comparison and 300 convenience goods) and 2,520 square metres of A3 floorspace. 3,390 square metres of D2 floorspace is also proposed. Cinema is included in the D2 floorspace allocation although no exact floorspace figure is given at this outline stage. Remaining floorspace includes 9,530 square metres for B1 uses.	Out-of-centre	1320	N/A	N/A
	Lee	App. Reference=K.16930	Land to east of Twyford Drive, Cherque Farm located on Lee-on-the-Solent and is a major new residential development. Erection of two storey neighbourhood shopping centre comprising 6 units with 14 residential flats above. Proposed uses include A1, D1 and C3. Note that a total of 884.76 square metres of floorspace for A1, A2, A5 and D1 uses has been approved. Out of this total, 527.72 square metres has been approved for A1 retail. The largest A1 unit will accommodate 378 square metres of convenience floorspace.	Out-of-centre	150	N/A	N/A
SUB-TOTAL					1470		
Havant BC	Havant	N/A	1 - 5 School Road, 5-25b Brockhampton Lane,	Outline application (04/68908/001) resubmitted Aug 2004, granted 23/12/04 for Class A1 retail warehouses. Size 60,708 sq.m gross.	5,640	N/A	N/A
	Havant	N/A	Potash Terrace	Application No. 04/59412/002, granted 21/06/05. Food and non-food retail warehouse park. Size 83,388 sq.m gross.	7,793	N/A	N/A
SUB-TOTAL					13433		
Portsmouth CC	Fratton	Site Reference=045	153 - 155 Fratton Road, Fratton - Former BMW Garage. Change of use of ground Floor to Retail use (A1)/ Likely to be comparison goods retail.	Edge-of-centre	1575	N/A	N/A
	Portsmouth	Site Reference=062	Craft Market, Gunwharf Quays, Portsmouth. Change of use of to shops (A1). Likely to be comparison goods retail.	Out-of-centre	1584	N/A	N/A
	Portsmouth	Site Reference=074	East Side Plaza site, Gunwharf Quays, Portsmouth. Construction of building to form retail units (A1, A2, or A3) on ground floor with 307 dwellings over. Likely to be comparison goods retail.	Out-of-centre	1259	N/A	N/A
SUB-TOTAL					4418		
Southampton CC	None	None	None	None	None	None	None
SUB-TOTAL					0		