Bournemouth, Christchurch and East Dorset Joint Retail and Leisure Study

Volume 1 - Final Report

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1.0 Introduction

Overview

1.1 Lichfields has been commissioned by Bournemouth Borough Council and Christchurch and East Dorset Councils to prepare a Joint Retail and Leisure Study. The study has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 23), strategic priorities for retail, leisure and commercial development (paragraph 156) and the evidence to assess the need for economic development (paragraph 161). The study has also been prepared in accordance with the Planning Practice Guidance (PPG).

1.2 The study will inform the review of the Christchurch and East Dorset Local Plan Part 1 - Core Strategy (2014) and the Bournemouth Local Plan, Core Strategy (2012). Any evidence base study carried out at the current time needs to be cognisant of some significant recent changes:

1. **Changes in policy** - the NPPF heralded the biggest single change in national planning policy in a generation, and it raises the bar for local authorities in terms of the positive approach and a greater emphasis on the deliverability of plans.
2. **Changes in the economy** - there has been significant uncertainty relating to town centres and the retail sector, particularly following the EU Referendum vote. The study must adopt up-to-date and authoritative economic forecasts.
3. **Changes in market** - the above issues have had an impact on the commercial property market dynamics, both in terms of local demand and on the overall ability of developers and firms to access finance.

1.3 The key objective of the Bournemouth, Christchurch and East Dorset Joint Retail and Leisure Study is to provide a robust and credible evidence base to inform the Councils' work on the review of the Local Plans, taking into account changes since previous evidence was prepared. The updated Local Plans will reflect the emerging housing, employment, retail and leisure needs for the next 16 years, running up to 2033.

1.4 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development and main town centre uses over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. A sequential approach to site selection should be adopted.

1.5 Long term floorspace capacity forecasts beyond 10 years are susceptible to change due to unforeseen circumstances. Long term projections beyond 2028 are not only subject to changes in terms of population growth, but also growth in expenditure per capita and growth in turnover efficiencies. Experian's recommended growth forecasts for expenditure and turnover are particularly uncertain in the long term and need to be carefully monitored. Small variations in Experian's recommended growth rates (i.e. published annually) can lead to large variations in floorspace capacity when projected over a long period, therefore long term projections must be treated with caution and kept under review, particularly projections between 2028 and 2033. For these reasons, this report provides projections up to 2023 and 2028, with horizon projections up to 2033 that need to be monitored and kept under review.

1.6 The Retail and Leisure Study is based on up to date and sound research. The study establishes existing shopping patterns, based on sound empirical evidence and comprehensive customer survey research, including both customers who use facilities in the Boroughs and District and those who shop elsewhere.

1.7 This report provides a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within Bournemouth, Christchurch and East Dorset. It provides a description of existing retail facilities within the Borough/District, and it identifies the role the main town, market town and rural centres play in meeting the needs of customers. The assessment of need includes both food and non-food retailing and eating/drinking away from the home.

1.8 The study includes an assessment of:

1 changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession, the availability of 2011 Census data, the requirements of the NPPF and the recent changes to permitted development rights;

2 the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2033;

3 the potential implications of emerging developments both within and Bournemouth, Christchurch and East Dorset, in terms of impact on town centres and potential changes to shopping patterns;

4 the existing retail hierarchy and network of centres and advises whether any changes are required; and

5 development plan policies, allocations and recommendations on how each centre can develop its role.

Report Structure

1.9 The Joint Retail and Leisure Study is split into two volumes: Volume 1 and Volume 2. Volume 1 (this report) is structured as follows:

1 section 2 summarises the relevant policy context;

2 section 3 describes the shopping hierarchy;

3 sections 4 and 5 provide need assessments for retail and other main town centre uses;

4 section 6 sets out the conclusions.

1.10 Volume 2 is split into two reports; one covering Bournemouth Borough and one covering Christchurch Borough and East Dorset District. Section 2 assesses the main centres in the Boroughs and Section 3 sets out the recommendations and conclusions. Health checks of each defined centre are also included in Volume 2.

1.11 Volumes 1 and 2 should be read alongside each other.

2.0 Policy Context

National Policy

2.1 The previous Joint Retail Assessment for Christchurch and East Dorset (2008) and the Bournemouth Retail and Leisure Capacity Study (2011) were based on the guidance set out in PPS4 which was superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. The 2012 update of the Joint Christchurch and East Dorset Retail Study post-dated the NPPF. The NPPF sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).

2.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

1 local planning authorities should positively seek opportunities to meet development needs of their area;

2 local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:

3 any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or

4 specific policies in this Framework indicate development should be restricted.

2.3 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

2.4 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

1 proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;

2 take account of the different roles and character of different areas, promoting the vitality of main urban areas;

3 encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

2.5 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20). In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

1 the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.

2 the role and function of town centres and the relationship between them, including any trends in the performance of centres.

3 the capacity of existing centres to accommodate new development.

2.6 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

1 recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;

2 define a network and hierarchy of centres that is resilient to anticipated future economic changes;

3 define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;

4 promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;

5 retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;

6 allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

7 allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

8 set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

9 recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

10 where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.7 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.8 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.9 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.10 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

2.11 The National Planning Policy Guidance (NPPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

2.12 The NPPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

2.13 Recent changes to the General Permitted Development Order (GPDO) have had an impact on town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres across the country; in particular the amount of Class A1 space is likely to reduce.

Local Policy

Bournemouth Borough Council

Bournemouth Local Plan: Core Strategy

2.14 The Bournemouth Local Plan: Core Strategy was adopted in October 2012. The Core Strategy sets out the vision, spatial strategy and core policies for the whole Borough up to 2026, including policies relating to retail and leisure development in the Borough.

2.15 Figure 1 of the Core Strategy sets out the hierarchy of Bournemouth's Retail Centres. Bournemouth Town Centre is at the top of the hierarchy, followed by Castlepoint. The hierarchy of centres is as follows:

Table 2.1 Bournemouth's Retail Hierarchy

Settlement
Bournemouth Town Centre
Castlepoint
Boscombe, Westbourne, Winton
Boscombe East, Charminster, Holdenhurst Road, Kinson, Moordown, Southbourne Grove, Tuckton, Wallisdown
Local Shopping Parades

Source: Bournemouth Local Plan: Core Strategy (2012)

2.16 Core Strategy Policy CS7 relates to Bournemouth Town Centre and sets out that Bournemouth Town Centre will be the most appropriate location in the Borough for development consisting of retail, cultural, leisure and business uses, or mixed use development consisting of these uses.

Development in these categories that are proposed outside the town centre, or other allocated sites, will be assessed sequentially in accordance with the town centre first approach and will only be permitted where the proposed use would not harm the vitality, viability and functionality of the town centre as a whole. Development proposals will only be permitted where they maintain or enhance the function of the town centre, the heritage and environmental characteristics of the town centre, and accord with policies in the Town Centre Area Action Plan (APP) and other adopted planning policies.

2.17 Core Strategy Policy CS9 relates to enhancing District Centres and states that when considering proposals for development within the district centres the Council will have regard to enhancing the function, vitality and viability of the District centres. Development within District centres will be considered acceptable in principle providing that it:

- maintains or improves upon the function, vitality and viability of the centre in relation to its retail, cultural and community facilities;
- is in scale to the centre, maintains or enhances the character and environmental quality of the centre;
- contributes positively to the range of services on offer;
- does not unreasonably harm the amenities of local residents; and
- does not result in the loss of ground floor retail / commercial floorspace to residential use.

2.18 Development proposals within, or outside of, the District centres that would result in a detrimental impact on the continued function, vitality and viability of a centre will be resisted. A range of environmental improvements, including street furniture, paving, traffic management, signage, street tree planting, landscaping and investment in sustainable forms of travel will be encouraged in and around District centres.

2.19 Core Strategy Policy CS11 relates to protecting local facilities and services and confirms that outside the Town Centre and District Centres, proposals for residential development which would lead to the loss of ground floor premises used, or last used for, commercial purposes will not be permitted; and proposals for commercial development that would result in the loss of premises or sites used, or last used, for a retail use will not be permitted, unless it can be demonstrated that there are adequate alternative retail facilities nearby.

Bournemouth District Wide Local Plan (2002, Saved Policies)

2.20 The Bournemouth District Wide Local Plan (2002) continues to have a number of saved retail policies. Saved Policy 5.19 relates to Core Shopping Areas and states planning permission will be granted for ground floor retail uses throughout the Core Shopping Area. Class A2 and A3 uses may be permitted provided it can be demonstrated the use will make a positive contribution to the diversification of the core and to its retail character, vitality and viability and is able to meet a number of criteria in relation to amenity, traffic and servicing.

2.21 Saved Policy 5.20 relates to Secondary Shopping Areas and sets out that in the areas identified as Secondary Shopping Areas, planning permission will be granted for Class A1 uses. Other uses appropriate to shopping centres will be granted planning permission where a number of criteria in relation to amenity, traffic and servicing are met, in addition to meeting the proviso that the use will not result in a concentration of uses that will have an adverse effect on the character of the street.

2.22 Saved Policy 5.26 relates to new retail floorspace outside a shopping designation and states outside the Core and Secondary Shopping Areas and Local Parades, the creation of additional retail floorspace will be resisted. The policy confirms that the sequential approach should be applied – if suitable sites in the centres are unavailable, edge of centre alternatives will be considered. Proposals elsewhere will only be permitted provided that there are no suitable town or edge of centre sites, there is sufficient future need and capacity to support such development, the development will not undermine the vitality or viability of the town centre/local centre/parades, the site is readily accessible by public transport and it would not significantly increase the number of vehicle movements.

Bournemouth Town Centre Area Action Plan (AAP) (2013)

2.23 The Bournemouth Town Centre AAP was adopted in March 2013. Policy U5 relates to retail growth and states planning permission will be granted for the development of new retail floorspace in order to enhance the role of Bournemouth Town Centre as an important sub-regional shopping destination. Provision will be made for a minimum of 23,410 sq.m net additional floorspace for comparison goods by 2026. New retail development should be primarily concentrated within the Primary Shopping Area.

2.24 AAP Policy U6 sets out the Council's approach to frontage designations in Bournemouth Town Centre. Within the designated primary frontage, the loss of retail units (Class A1) will be resisted. Within the designated secondary frontage, shops (Class A1), financial and professional services (Class A2) and cafés and restaurants (Class A3) will be considered acceptable, provided that the proposed development:

- would make a positive contribution to the diversification of the area and complement its retail character, vitality and viability; and
- would not result in a concentration of non-retail uses.

2.25 Within the designated tertiary frontages, applications for a change of use will be permitted, provided that the proposal contributes to the retail and community functions of the different parts of the Town Centre and does not conflict with other AAP policies. Within designated frontages, planning permission will be granted for the change of use of upper floors situated above commercial units to residential, offices or other service or community use, provided that the proposal would not adversely affect the viability of the premises it relates to.

2.26 AAP Policy U7 relates to cafés and restaurants and states planning permission will be granted for the development of cafés and restaurants (Class A3) within designated Secondary and Tertiary frontages, provided that the proposed use does not conflict with other Local Plan policies. Particular consideration will be given to the role of the Secondary and Tertiary retail frontages, the impact of the development on nearby residential amenities and the character of the street; the impact of noise and fumes likely to be generated by the premises' activity; the internal layout and operation of the premises, in order to ensure any Class A4 element remains subservient to the Class A3 element; servicing, disposal and management of the waste generated by the proposed use; and where appropriate, provision of adequate parking facilities.

2.27 AAP Policy U8 relates to leisure, culture and entertainment facilities and sets out that planning permission will be granted for such facilities that would be attractive for a wide range of visitors and residents of all ages in the Town Centre. Leisure, cultural and entertainment facilities of 1,000 sq.m or above should be concentrated within the designated Central Area.

2.28 AAP Policy U9 relates to evening and night time uses and states the development of a wider range of evening and night time activities that would be attractive to all within the Town Centre will be encouraged. Within the Bournemouth Town Centre Cumulative Impact Area, the Council will presume against the development of additional Class A4 and A5 uses, as well as nightclubs, unless the applicant demonstrates that:

- the proposed use would not contribute to unacceptable problems of disorder or anti-social behaviour; and
- the proposed use would not have an adverse impact on nearby amenities as a result of increased activity, noise and fume levels.

Christchurch Borough Council and East Dorset District Council

Local Plan Part 1 – Core Strategy (2014)

2.29 The Christchurch and East Dorset Local Plan Part 1 – Core Strategy was adopted in April 2014. The Core Strategy sets out the broad development strategy for the Councils until 2028, and contains the main vision, objectives and planning policies to make the strategy happen.

2.30 Core Strategy Policy KS6 sets out the hierarchy of Christchurch and East Dorset's Retail Centres. The hierarchy is as follows:

Table 2.2 Christchurch and East Dorset's Retail Hierarchy

Hierarchy	Settlement
Town Centre	Christchurch, Ferndown, Verwood, Wimborne Minster
District Centre	West Moors, Highcliffe
Local Centre	Purewell, Barrack Road, Corfe Mullen, West Parley
Parades	All other clusters of shops

Source: Christchurch and East Dorset Local Plan Part 1 - Core Strategy (2014)

2.31 Core Strategy Policy KS7 sets out the role of the Town and District Centres. Their vitality and viability will be strongly supported. Town and District centre boundaries will be the focus for town centre uses, including employment, retail, leisure and entertainment, arts, culture, religion, health, tourism, places of assembly, community facilities and higher density housing. A sequential assessment will be required for planning applications for main town centre uses that are not in an existing centre to ensure that all in-centre options have been thoroughly assessed before less central sites are considered. Where it has been demonstrated that there are no town centre sites to accommodate the proposed development, preference is given to edge of centre locations which are well connected to a centre by means of easy pedestrian access.

2.32 In terms of impact, Core Strategy Policy KS7 sets out that an impact assessment is required for planning applications for main town centre uses not in a centre to assess the impact on town centre vitality and viability, town centre investment plans, and impact on allocated sites outside town centres. The following thresholds apply:

Table 2.3 Christchurch and East Dorset Impact Thresholds

Settlement	Impact Threshold
Christchurch, Ferndown, Wimborne	Over 1,000 sq.m (gross)
All other areas	Over 500 sq.m (gross)

Source: Christchurch and East Dorset Local Plan Part 1 - Core Strategy (2014)

2.33 In terms of frontage designations, Core Strategy Policy KS7 goes on to state that within the Primary Shopping Frontages, at ground floor, support will be given for retail stores (Class A1), financial and professional services (Class A2), food and drink premises (Class A3), non-residential institutions (Class D1) and leisure uses (Class D2). Non retail uses (other than Class A1) will not cumulatively amount to more than 30% of all ground floor units within the Primary Shopping Frontages. Additionally, the proposal should not result in more than three continuous frontages being non-retail or leisure uses and shop frontage appearances should be retained.

2.34 In Secondary Shopping Frontages the same uses will be supported as for Primary Shopping Frontages along with drinking establishments (Class A4), hot food takeaways (Class A5) and hotels (Class C1).

2.35 Core Strategy Policy KS8 relates to future retail provision and sets out that in order for key retail centres in Christchurch and East Dorset to maintain and enhance their vitality and viability, it is important that provision is made for additional retail floorspace to meet the needs of a growing population with associated increasing levels of available retail expenditure. In Christchurch there is a projected requirement for in the region of 8,100sqm net additional comparison floorspace for the period to 2031 and 2,300 sq.m net additional convenience floorspace. In East Dorset there is a projected requirement for in the region of 5,200sqm net additional comparison floorspace and 4,000sqm net additional convenience floorspace to 2031.

2.36 In Christchurch Borough, Christchurch town centre will be the main focus for meeting the borough wide projection for comparison floorspace. Highcliffe centre will provide a small scale contribution towards the overall borough wide figure. Christchurch town centre will be the focus for meeting the borough wide projection for convenience floorspace.

2.37 In East Dorset, Wimborne Minster, Ferndown and Verwood will be the main focus for comparison retail floorspace provision in the district. West Moors will also deliver additional comparison floorspace of a smaller scale to contribute to the overall district projection. Ferndown and West Parley will be the focus for convenience floorspace provision in the district. Corfe Mullen, Verwood, West Moors and Wimborne Minster have potential to deliver smaller scale provision contributing to the overall district figure.

2.38 Core Strategy Policy CH1 sets out that Christchurch will continue to act as the key town centre in the Borough and will be the main focus for retail development. Future growth and development will be based around promoting the town centre as a place to shop, participate in leisure activities, enjoy culture, access key services, and enjoy good food and drink. The following sites have been identified as strategic sites that will play a pivotal role in delivering the Town Centre Vision and Key Strategy.

- The Magistrates' Court Site
- Saxon Square
- The Lanes
- Land between Bridge Street, Stony Lane South and the Civic Offices
- Stony Lane

2.39 Core Strategy Policy CH2 sets out that the Town Centre Boundary of Christchurch will be the focus for town centre uses including higher density residential, employment, retail, leisure and entertainment, offices, arts, culture and tourism development subject to compliance with other national and local policy. Core Strategy Policy CH3 defines the Christchurch Town Centre Primary Shopping Area, where retail development will be concentrated, and the Primary and Secondary Shopping Frontages.

2.40 Core Strategy Policy CH4 relates to the vision for Highcliffe District Centre. The centre will accommodate further comparison retail floorspace, in the region of 500sqm (net) to 2028 with Christchurch Town Centre remaining the principal centre for retail development in the Borough. Retail uses will be expanded and enhanced to promote the vitality and viability of the centre consistent with the Borough retail strategy. The strategy for Highcliffe will seek to enhance the niche retail offer to attract more visitors with unique, specialist shops. Core Strategy Policy CH5 defines the Highcliffe District Centre Primary and Secondary Shopping Frontages.

2.41 Core Strategy Policy CH6 relates to development in the Primary Shopping Frontages and states that within the Saxon Square and High Street Primary Core, and the Primary Frontages at Bargates and Highcliffe, planning permission for the change of use of existing ground floor retail premises (Class A1) to non - retail uses will be permitted provided that:

- the proposed use is for a financial or professional service use (Class A2), or for a food and drink uses (Class A3), or for non-residential institutions falling within Class D1 and leisure and entertainment uses falling within Class D2;
- non-retail uses (other than Class A1) will not cumulatively amount to more than 30% of all ground floor units in each of the identified areas;
- the proposal will not result in more than three continuous frontages in non-retail use (other than Class A1); and
- a shop front appearance will be retained.

2.42 Core Strategy Policy CH7 relates to development in the Secondary Shopping Frontages and states that Proposals for the change of use of existing non-residential premises located within the Secondary Frontages at Bargates, Wick Lane, Church Street, Castle Street, Barrack Road and Purewell and Highcliffe as identified on the proposals map will be permitted provided that the following criteria are satisfied:

- the proposed use is for a financial or professional service use (Class A2), or a food and drink use (Class A3), drinking establishments (Class A4), hot food takeaways (Class A5), hotels (Class C1), or non - residential institutions falling within Class D1 and leisure and entertainment uses falling within Class D2; and
- the amenities of the local residents are not adversely affected by noise or disturbance, or by loss of light and privacy.

2.43 Core Strategy Policy WMC1 sets out the vision for Wimborne Minster Town Centre. Wimborne Minster will continue to act as a key town centre in the District and together with Ferndown will be the main focus for retail development. In terms of retail, the range of retail uses will be supported and improved; convenience units of 400 – 500 sq.m and comparison units of 2,500 - 2,550 sq.m during the plan period, to continue to provide a niche range of quality comparison goods shops to appeal to the residents and large number of visitors to the town. The evening economy uses such as restaurants, cafés and pubs will be supported in the secondary shopping locations to enhance the vibrancy of the afternoon and evening economy of the town.

2.44 Core Strategy Policy FWP1 sets out the vision for Ferndown Town Centre. Ferndown will continue to act as a key Town Centre in the District and will remain a key focus for retail development. In terms of retail, retail uses will be expanded and enhanced to promote the vitality and viability of the centre; convenience units up to 1400 - 1500 sq.m and comparison units up to 1500 – 1600 sq.m. The strategy will seek to enhance the niche retail offer and, with a mix of unit sizes, improve the presence of national multiples, to provide for better choice in comparison shopping. An enhanced pedestrianised Penny's Walk will help to attract national multiple chains whilst niche retail shops will continue to thrive on Victoria Road.

2.45 Core Strategy Policy VTSW1 sets out the vision for Verwood Town Centre. Verwood Town Centre will be a key town centre in East Dorset, providing a thriving busy centre to the local population and visitors. In terms of retail, the range of retail uses will be supported and improved to provide more comparison and convenience goods shops in small to medium size units to appeal to small independent shops. This includes up to 600 - 650 sq.m of convenience floorspace and 700 - 800 sq.m of comparison floorspace in Verwood in the plan period.

2.46 Core Strategy Policy VTSW9 sets out the vision for West Moors District Centre. It will continue to act as a key District Centre in East Dorset, providing a central focus to the local population. In terms of retail, the range of retail uses will be supported and improved to provide more comparison goods shops, in small to medium sizes to appeal to small independent shops. This includes up to 40 - 50 sq.m of convenience floorspace and 150 -200 sq.m of comparison floorspace in West Moors in the plan period.

3.0 Current Provision and Trends

Introduction

3.1 This section outlines national trends that are likely to influence the need for retail and town centre facilities in Bournemouth, Christchurch and East Dorset and the prospects for attracting new investment. It also summarises current provision within the Boroughs and District, which provides the baseline for future projections in later sections of this report.

Retail Trends

3.2 The economic downturn had a significant impact on the retail and leisure sectors. A large number of national operators failed (e.g. BHS, Comet, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. BHS and Austin Reed are the latest operators to experiencing difficulties, which suggests market conditions are still challenging.

3.3 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators, for example Tesco and Sainsbury's have not implemented a number of planning permissions for new food stores and store extensions across the country.

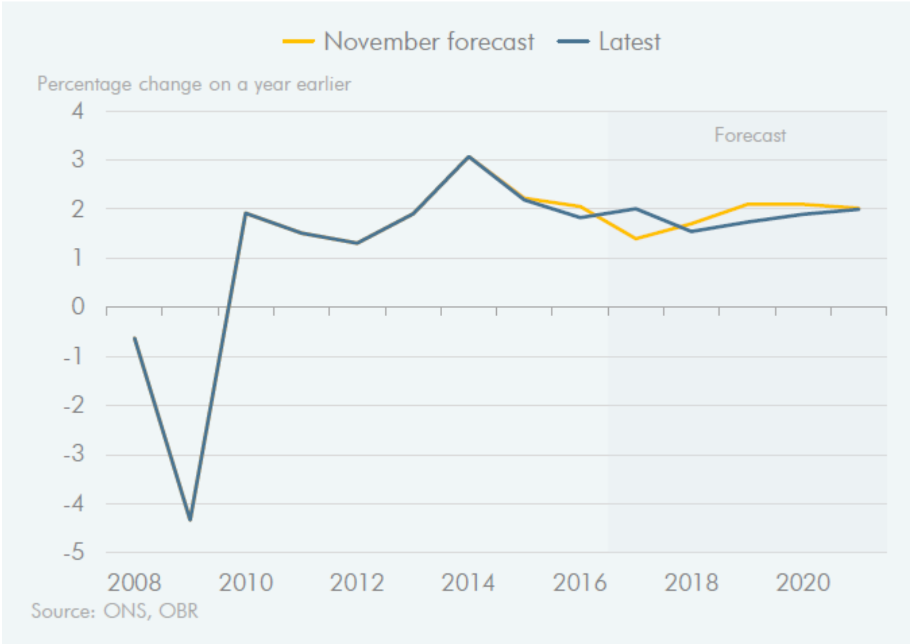
3.4 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2017 to 2021). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national tends within the retail sector is set out below.

Expenditure Growth

3.5 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However Experian forecasts the impact of the EU Referendum will result in slower expenditure growth in the short term, because the overall economic forecasts are lower. Experian forecasts modest levels of growth for the next two years.

3.6 Figure 3.1 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014 and 2% in 2015.

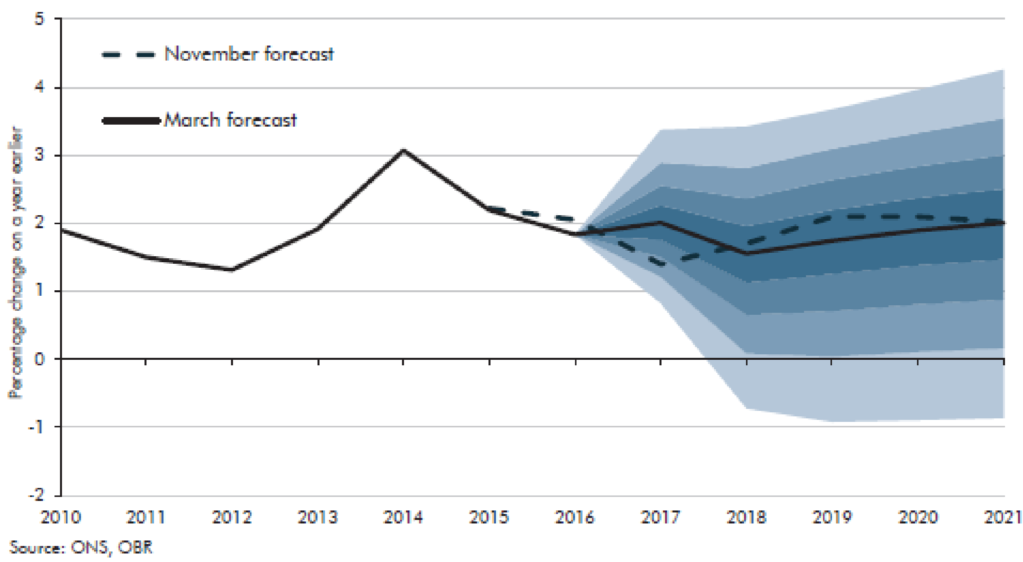
Figure 3.1 Forecast GDP Growth to 2020



Source: ONS, OBR

3.7 For 2016 / 2017, growth is expected to sit at circa 2% per year. In terms of future growth the latest projections indicate a fall in 2018 to 1.6% before a steady increase back up to 2% by 2021. The blue shading shows 20% probability bands around the projection line.

Figure 3.2 Real GDP Growth Fan Chart (March 2017)



Source: OBR Economic and Fiscal Outlook - March 2017

3.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. These national trends are anticipated to be mirrored in Bournemouth, Christchurch and East Dorset.

3.9 For convenience goods, Experian forecasts (November 2016) a 1.1% decline in expenditure per person between 2016 and 2018 and zero growth thereafter up to 2023. In the longer term, Experian anticipates limited growth (0.1% per annum) from 2024. For comparison goods, Experian forecast higher levels of growth in the future, with 5.8 between 2016 and 2018 and an average of 3% per annum from 2019, but still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.10 Experian's latest expenditure projections take into account the implications of the EU referendum result, indicating this has created major uncertainties regarding the long term outlook for the UK economy. Experian's baseline forecasts reflect a small downgrade in the UK's long term projections for trade, investment and GDP. However the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 14 (November 2016) states:

"The expansion in comparison goods volumes, averaging 3.2% per head to 2035, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.

Convenience goods recorded a marginal decline in the decade leading up to the 2008 recession. Volumes were severely hit during the recession and its aftermath….. Our central forecast has a renewed squeeze in convenience goods in the short term, before sales per head growth settles at 0.1% a year from 2019 to 2035."

3.11 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to about 14% in 2012. Vacancy rates have recovered to 11.8% in 2015 and 11.2% in 2016.

3.12 There were 262 vacant Class A shop units within the 13 defined centres in Bournemouth Borough (January 2017), an overall vacancy rate of 12.9%, which is slightly higher than the Goad national average (11.2%). Bournemouth, Boscombe, Boscombe East, Kinson and Tuckton have particularly high vacancy rates when compared with the national average (between 14.8% to 20%).

3.13 There were 55 vacant Class A shop units within the 6 defined centres in Christchurch and East Dorset, an overall vacancy rate of 7.8% which is lower than the Goad national average (11.2%). All centres within Christchurch and East Dorset have vacancy rates lower than the national average. This suggests the centres in the Borough and District are performing relatively healthily post-recession.

New Forms of Retailing

3.14 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within Bournemouth, Christchurch and East Dorset, because they will affect the amount of expenditure growth that will be potentially available to support new development and the strength of operator demand for new floorspace.

Special Forms of Trading/Home Shopping

3.15 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 14 (November 2016) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 15% of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2016 against 4.7% in June 2008...

...non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 59.3 million internet users in the UK (representing 91.6% of the population) in November 2015 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching 18.6% by 2022 rising to 20.4% by the mid-2030s."

3.16 This retail update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.17 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.18 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

Food Store Operators

3.19 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade.

3.20 A number of proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats. Examples of this are the unimplemented Asda and Morrison's stores in Christchurch and the unimplemented Sainsbury's extension at Ferndown.

3.21 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Bournemouth with Lidl stores in Bournemouth, Boscombe and Winton and Aldi stores in Boscombe, Wallisdown and Holdenhurst Road. In Christchurch and East Dorset this expansion is also evident with Aldi in Christchurch and Lidl stores in Christchurch and a Lidl store in Ferndown. The discount sector is actively expanding and both Aldi and Lidl may look for further opportunities, but representation is already strong in Christchurch and East Dorset.

Comparison Retailers

3.22 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.23 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak during and after the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. The retail warehouse sector is reasonably well represented on retail parks in Bournemouth including Mallard Road Retail Park, Turbary Retail Park, Westover Retail Park and Parkway Retail Park. The retail warehouse sector is reasonably well represented on retail parks in Christchurch and East Dorset including Ringwood Road Retail Park, Christchurch Retail Park, Meteor Shopping Park and Stony Lane Retail Park. However, the availability of a wide range and choice of retail warehouse operators in Poole is likely to constrain operator demand in Bournemouth, Christchurch and East Dorset, particularly to the west.

3.24 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq. m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, e.g. Bournemouth. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.

3.25 The continuation of these trends will influence future operator requirements in Bournemouth, Christchurch and East Dorset with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services. The absence of larger modern units may restrict the ability to attract major retail investment into the area.

Charity and Discount Shops

3.26 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. In many centres, charity shops have occupied vacated shop premises during the recession. This trend is evident in most centres in Bournemouth, Christchurch and East Dorset. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.

Non Retail Services

3.27 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres.

3.28 Recent changes to the General Permitted Development Order (GPDO) will also have an impact on town centres. These measures allow for greater flexibility for changes of use of small premises from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is higher.

3.29 Small vacant premises and units coming up for lease renewal will be the most vulnerable to these changes of use to non-retail. To date these changes do not appear to have had a significant impact within the majority of centres within Bournemouth, Christchurch and East Dorset. The most vulnerable centre may be Bournemouth town centre, Boscombe, Boscombe East, Kinson and Tuckton which have much higher than average vacancy rates when compared to the national average. A review of these frontage policies is provided in the Volume 2 reports.

3.30 These trends are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.31 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

Centres within and Surrounding the Study Area

3.32 Bournemouth Borough and Christchurch and East Dorset Councils are bounded by several local authority areas, namely Poole to the west of Bournemouth, New Forest to the east of Christchurch and East Dorset and Wiltshire and North Dorset to the north/north west of East Dorset. The coastal location of Bournemouth and Christchurch effectively presents half the catchment area shopping centres would normally benefit from.

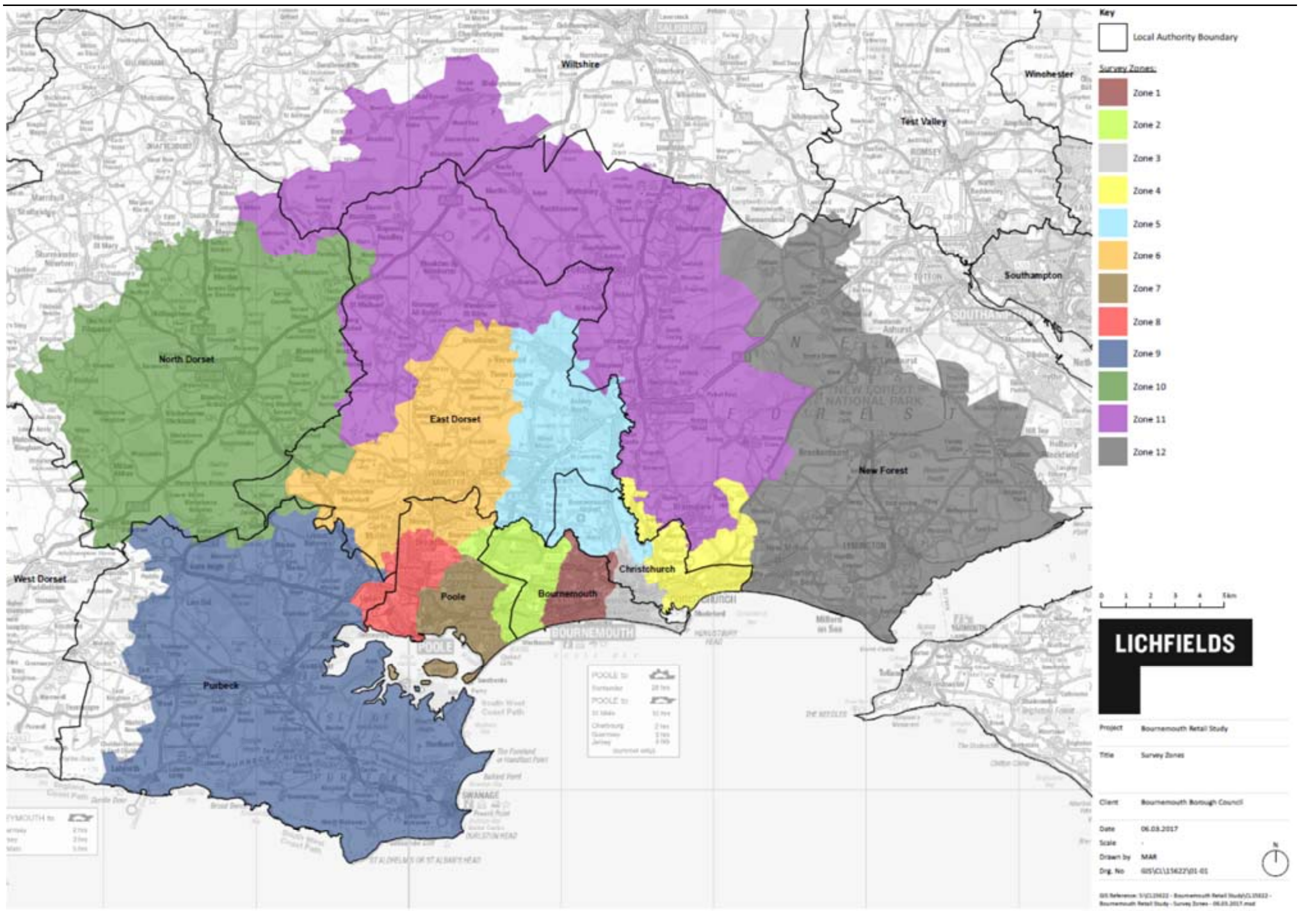
3.33 The Bournemouth Local Plan: Core Strategy (2012) sets the retail hierarchy of Bournemouth's retail centres, comprising the strategically significant town centre of Bournemouth; Castlepoint Shopping Park; Boscombe, Westbourne and Winton; Boscombe East, Charminster, Holdenhurst Road, Kinson, Moordown, Southbourne Grove, Tuckton, Wallisdown; and the Local Shopping Parades.

3.34 The Christchurch and East Dorset Local Plan Part 1 – Core Strategy (2014) sets the retail hierarchy of Christchurch and East Dorset's retail centres, comprising the Town Centres of Christchurch, Ferndown, Verwood and Wimborne Minster, the District Centres of West Moors and Highcliffe and the Local Centres of Purewell, Barrack Road, Corfe Mullen and West Parley.

3.35 The quantitative analysis in this report is based on a defined study area (shown in Figure 3.3), which needs to cover the primary catchment areas of shopping destinations within

Bournemouth, Christchurch and East Dorset. These catchment areas extend beyond the Borough boundaries into neighbouring authorities. The study area is sub-divided into zones for more detailed analysis. The zones broadly reflect the catchment areas of the main centres within Bournemouth, Christchurch and East Dorset.

Figure 3.3 Joint Retail and Leisure Study Area (see Appendix 1 for larger scale plan)



3.36 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the town centre destinations and other relevant centres outside the study area are shown in Table 3.1.

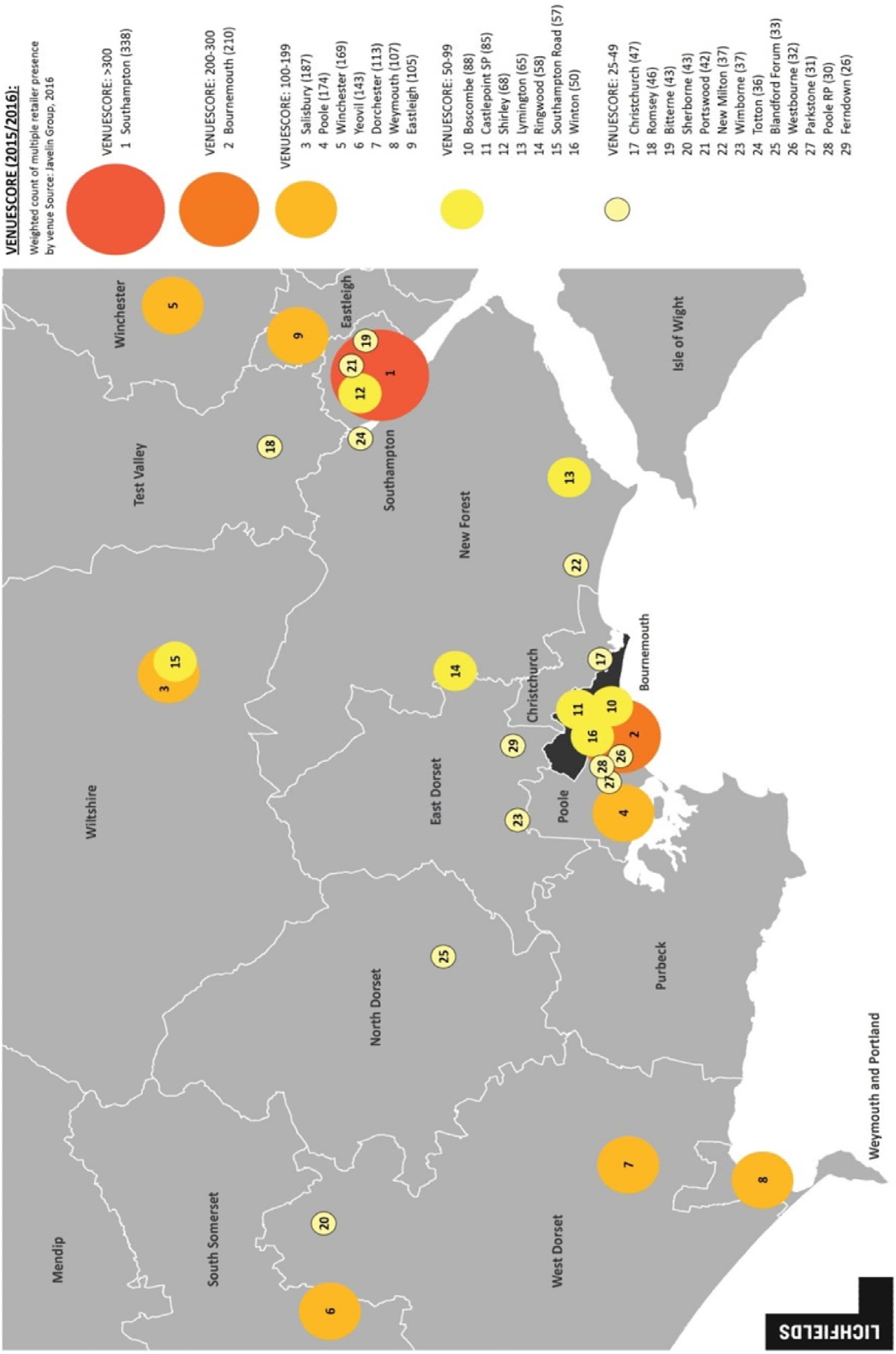
3.37 At the top of the hierarchy in the region is Southampton (ranked 20th) which influences shopping patterns across Bournemouth, Christchurch and East Dorset. Bournemouth is at the next tier in the hierarchy (72nd), along with Salisbury (94th), Poole (112th), Winchester (125th) and Yeovil (160th). Boscombe (308th), Castlepoint (323rd) and Westbourne (1,008th) are the next highest ranked centres within Bournemouth Borough. Christchurch (654th) is the highest ranked centre in the Christchurch Borough and Wimborne (847th) is the highest performing centre in East Dorset, followed by Ferndown (1,233rd).

3.38 Southbourne, Holdenhurst Road and Verwood are lower order centres (ranked 1,559th or lower) and have a small selection of national multiples. Smaller centres in Bournemouth, Christchurch and East Dorset have few national multiple retailers and are not included within Venuescore's analysis. The location of Venuescore centres is shown in Figure 3.4, and this indicates that residents in Bournemouth, Christchurch and East Dorset have good access to a number of larger centres, as well as having a choice of smaller centres to meet their day to day shopping needs.

Table 3.1 Javelin's Venuescore UK Shopping Index and UK Rank 2016/17

Centre	Venuescore	UK Rank	Market Position
Southampton	338	20	Middle
Bournemouth	210	72	Upper Middle
Salisbury	187	94	Upper Middle
Poole	174	112	Middle
Winchester	169	125	Upper Middle
Yeovil	143	160	Middle
Dorchester	113	217	Upper Middle
Weymouth	107	232	Middle
Eastleigh	105	238	Middle
Boscombe	88	308	-
Castlepoint	85	323	Middle
Shirley	68	416	Lower Middle
Lymington	65	438	Upper Middle
Warminster	64	451	Lower Middle
Ringwood	58	508	Upper Middle
Salisbury, Southampton Road	57	520	Middle
Winton	50	608	Lower Middle
Christchurch	47	654	Middle
Romsey	46	666	Middle
Bitterne	43	710	Lower Middle
Sherborne	43	710	Upper Middle
Portswood	42	733	Lower Middle
New Milton	37	847	Lower Middle
Wimborne	37	847	Upper Middle
Totton	36	879	Lower Middle
Blandford Forum	33	968	Middle
Westbourne	32	1008	Upper Middle
Parkstone	31	1044	Middle
Poole Retail Park	30	1074	Middle
Ferndown	26	1233	Middle
Christchurch Retail Park	21	1481	Middle
Bournemouth, Turbary Retail Park	20	1559	-
Southbourne	20	1559	Middle
Ferndown, Ringwood Road	20	1559	Middle
Holdenhurst Road, Bournemouth	19	1625	Middle
Bournemouth, Riverside Ave	13	2377	Lower Middle
Bournemouth, Wimborne Road	13	2377	Middle
Bournemouth, Mallard Rd Retail Park	12	2566	Lower Middle
Verwood	12	2566	Middle
Somerford	11	2815	Middle

Figure 3.4 Javelin Venuescore Rank and Scores



3.39 It should be noted that the Venuescore data is weighted towards clothing and fashion retailing. Within the sub-region, clothing/fashion shopping facilities are primarily focused in the city and larger town centres. Consistent with this polarisation of clothing/fashion shopping in larger centres, Bournemouth, Salisbury, Poole, Winchester and Yeovil received very similar scores for fashion orientation.

3.40 Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 3.1. Again this information is weighted towards clothing and fashion retailing.

3.41 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.

3.42 Southampton is classified as having a "Middle" market position, however Bournemouth and Salisbury are both classed as having an "Upper Middle" market position, which suggests they offer a higher proportion of luxury/high quality retailing. Southampton is a much larger centre regional centre and has a much wider choice of facilities catering for different customers. This may have distorted Javelin's overall market positon for the centre. In overall terms Southampton has stronger provision of luxury/high quality retailing than Bournemouth and Salisbury.

3.43 Castlepoint in Bournemouth Borough is classified as having a "Middle" market position, comparable to Christchurch centre also classed as having a "Middle" market position. Wimborne in East Dorset is classed as having an "Upper Middle" market position despite its relatively low UK rank. The Javelin analysis of centres suggests centres within the study area have a good provision of quality clothes/fashion shops, including independent shops and multiples.

3.44 Westbourne in Bournemouth Borough is also classed as having an "Upper Middle" market position, again indicating that the centre has a good provision of high quality independent clothes/fashion shops. All other defined centres in Bournemouth, Christchurch and East Dorset which are included in Venuescore are classified as having "Middle" market positions.

3.45 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

1 age focus (is the offer targeting younger or older consumers?); and

2 fashionability of its offer (is the clothing offer traditional or progressive?).

3.46 The Javelin Group classifies retailers in terms of their "fashionability" ranging from "traditional" at one end, then "updated classic", "fashion moderate", "fashion forward" through to "progressive" at the other, i.e. least fashionable to the most fashionable. Shopping destinations in London dominate the most "progressive" venues, such as Carnaby Street and Bond Street.

3.47 The age positon of the fashion offer is also classified ranging from "young", "middle" to "old", for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and others such as Evans and Edinburgh Woollen Mill appealing to older people. The results for the main centres within Bournemouth, Christchurch, East Dorset and the surrounding area are shown in Table 3.2 below.

3.48 The centres within Bournemouth tend to cater predominantly for moderate tastes. This reflects the mixed profile of residents within the Borough. Southbourne is described as "Progressive" which could in part be attributed to the presence of a number of specialist independent retailers. No centres in Bournemouth have a fashion forward offer.

Table 3.2 Venuescore UK centre Fashion Attributes

Centre	Age	Fashion Position
Southampton	Mid	Fashion Moderate
Bournemouth	Mid	Fashion Moderate
Salisbury	Old	Updated Classic
Poole	Mid	Fashion Moderate
Winchester	Old	Updated Classic
Yeovil	Mid	Fashion Moderate
Dorchester	Old	Traditional
Weymouth	Mid	Fashion Moderate
Eastleigh	Old	Updated Classic
Boscombe	Mid	Updated Classic
Castlepoint	Mid	Fashion Moderate
Shirley	Old	Updated Classic
Lymington	Old	Updated Classic
Warminster	Mid	Traditional
Ringwood	Old	Traditional
Salisbury, Southampton Road	Old	Fashion Moderate
Winton	Old	Updated Classic
Christchurch	Mid	Fashion Moderate
Romsey	Old	Traditional
Bitterne	Old	Updated Classic
Sherborne	Old	Traditional
Portswood	Old	Progressive
New Milton	Old	Updated Classic
Wimborne	Old	Traditional
Totton	Old	Fashion Moderate
Blandford Forum	Old	Traditional
Westbourne	Old	Fashion Moderate
Parkstone	Mid	Traditional
Poole Retail Park	Old	Fashion Moderate
Ferndown	Old	Fashion Moderate
Bournemouth, Turbary Retail Park	Old	Updated Classic
Southbourne	Old	Progressive
Ferndown, Ringwood Road	Old	Fashion Moderate
Holdenhurst Road, Bournemouth	Old	Fashion Moderate
Bournemouth, Riverside Ave	Old	Fashion Moderate
Bournemouth, Wimborne Road	Old	Fashion Moderate
Bournemouth, Mallard Rd Retail Park	Old	Progressive
Verwood	Old	Progressive
Somerford	Old	Progressive

Source: Venuescore, Javelin

3.49 Christchurch centre also cater predominantly for moderate tastes. In East Dorset, the centres of Wimborne, Ferndown and Verwood tend to cater predominantly for traditional, moderate or progressive tastes (retrospectively). This reflects the mixed age profile of residents within the area.

4.0 Future Requirements for Retail Uses

Introduction

4.1 This section assesses the need for Class A1 to A5 retail uses within Bournemouth, Christchurch and East Dorset. The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

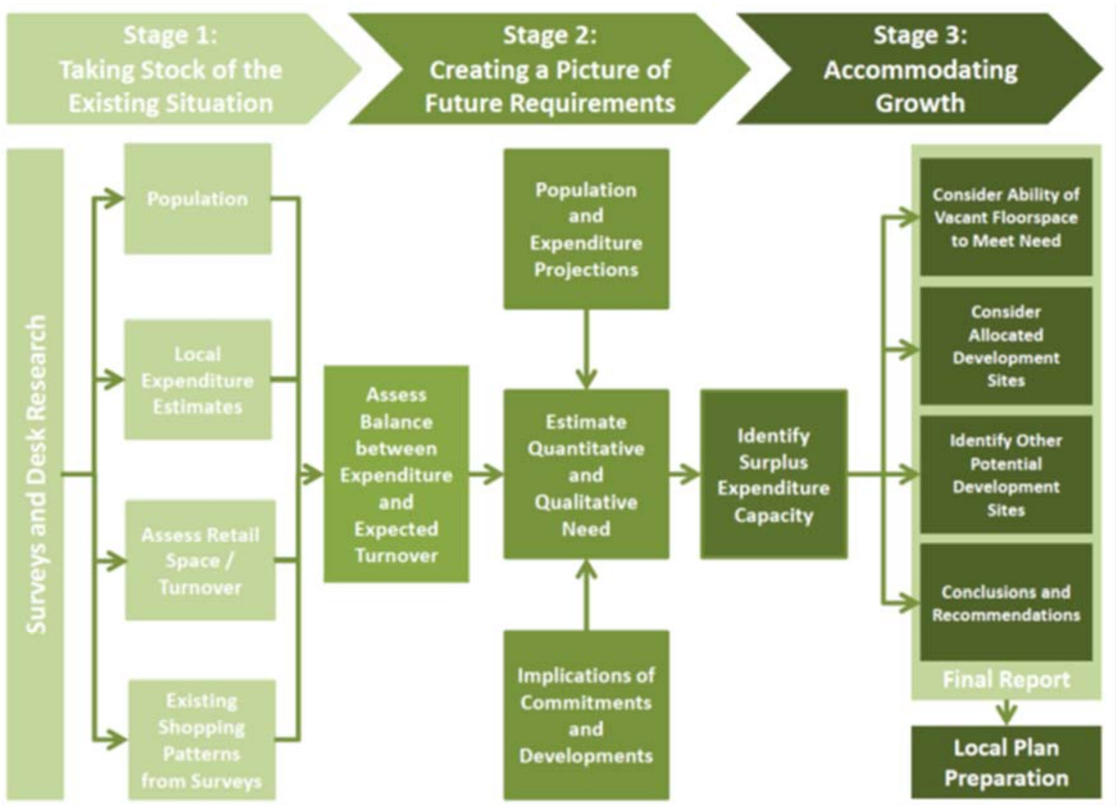
4.2 This section objectively assesses the quantitative and qualitative scope for retail uses in Bournemouth, Christchurch and East Dorset. As indicated in Section 1, long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Long term projections beyond 2028 must be treated with caution and kept under review. For these reasons this section provides projections up to 2023 and 2028, with horizon projections up to 2033 that will need to be monitored and kept under review.

4.3 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health centres in Volume 2 (Appendix 1).

Methodology and Base Data

4.4 The methodology is summarised in Figure 4.1. The approach follows the key steps identified within the Planning Practice Guidance (PPG) and adopts economic growth forecasts widely used and for development plan and accepted as robust at planning inquiries.

Figure 4.1 Methodology for Estimating Future Requirements for Retail Floorspace



Source: Lichfields

4.5 Stage 1 establishes existing demand (population and expenditure) and supply (floorspace and facilities). Stage 2 assesses the balance between supply and demand and projects forward to quantify future requirements for new facilities. Stage 3 considers how future growth should be distributed and accommodated.

Price Base

4.6 All monetary values expressed in this study are at 2015 prices, consistent with Experian's base year expenditure figures for 2015 which is the most up to date information available.

Study Area

4.7 A study area has been defined to cover these catchment areas and a household telephone survey has been undertaken in order to quantify existing shopping and leisure patterns.

4.8 The Study Area covers the primary catchment areas of the town centres in Bournemouth, Christchurch and East Dorset. The primary catchment area is the hinterland where each town/ shopping destinations attracts the majority of its trade. The study area has been sub-divided into 12 zones as shown in Appendix 1, based on postcode boundaries, reflecting the primary catchment areas of the main destinations within Bournemouth, Christchurch and East Dorset. i.e. Bournemouth Town Centre, Christchurch Town Centre, Highcliffe, Ferndown, Verwood, Wimborne as well as those beyond i.e. Poole and Ringwood.

Population

4.9 The projected population within the study area between 2017 to 2033 is set out in Table 1 in Appendix 2. Base year population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected forward up to 2033 based on the Office of National Statistic's latest 2014-based sub-national population projections (published May 2016). The base year 2017 population within the study area is 672,392. This population is projected to increase to 749,700 by 2033, and increase of 17%.

Tourism

4.10 In addition to the resident population, Bournemouth, Christchurch and East Dorset's town centres benefit from tourist visitors who do not live in the local area. The Tourism in Dorset Report prepared by The South West Research Company for the Dorset LEP (February 2016) indicates Dorset County as a whole attracts 14.8 million over-night stays and 25.5 million day trips. These figures suggest that on average there are 110,400 tourist visitors in the County each day.

4.11 The Economic Impact of Dorset's Visitor Economy 2015 Report for Christchurch (prepared by The South West Research Company) indicates that Christchurch attracts around 900,000 over-night stays and around 1.5 million day trips. The same report prepared for East Dorset indicates East Dorset attracts around 900,000 over-night stays and around 2.2 million day trips.

4.12 The National Coastal Tourism Academy's Facts and Figures about Bournemouth's Visitors indicates Bournemouth attracts around 3.98 million over-night stays and 5.82 million day trips.

4.13 As a percentage of the total visitor days in Dorset County, Bournemouth attracts 25% of visitors, Christchurch 6% and East Dorset 8%. Spread throughout the year, these tourist visitors equate to an average of 43,000 additional people each day. This additional non-resident population will generate trade for shops and services in Bournemouth, Christchurch and East Dorset.

Retail Expenditure

4.14 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2017 have been obtained.

4.15 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 14 - November 2016) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

4.16 Experian's EBS growth forecast rates for 2016 to 2018 reflect the current economic circumstances and post Brexit forecasts. Experian provides an appropriate growth rate for the short term (for convenience goods: 0% for 2016, -0.2% for 2017 and -0.9% for 2018; for comparison goods: +3.3% for 2016, +1.4% for 2017 and +1.0% for 2018). These low expenditure growth rates suggest scope for new floorspace will only emerge due to population growth and/or high base year trading levels. These issues are addressed in this section.

4.17 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0% per annum for convenience goods between 2019 and 2023, and 0.1% per annum after 2023. For comparison goods Experian recommends a growth rate of 3% per annum between 2019 and 2023, and 3.2% per annum after 2023.

4.18 These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

4.19 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2017 is:

- 10.7% of convenience goods expenditure; and
- 18.5% of comparison goods expenditure.

4.20 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2017 are:

- 3.2% of convenience goods expenditure; and
- 13.8% of comparison goods expenditure.

4.21 The projections provided by Experian suggest that these percentages will increase to 3.9% and 15.6% by 2021 respectively. In the longer term, the growth is predicted to fall or reverse slightly for comparison goods. The long term projections are 5% and 16.3% by 2031. These figures have been adopted in this assessment.

4.22 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

4.23 On-line shopping has experienced rapid growth over the last 20 years, but in proportional terms the latest available data suggests on-line shopping is still much lower than traditional forms of shopping. Experian state that they expect that the SFT market share will continue to grow. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.6% by 2022, rising to 20.4% by the mid-2030s.

4.24 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. As a result, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

4.25 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2033. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3. Forecasts of food and beverage spending per capita are shown in Table 2 in Appendix 4.

4.26 Table 3 in Appendix 2 sets out total convenience goods within the study area up to 2033 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3 in Appendix 3. Forecasts of food and beverage spending are shown in Table 3 in Appendix 4.

4.27 As indicated above, in addition to the resident population, Bournemouth, Christchurch and East Dorset benefit from tourist visitors who do not live in the local area, estimated to be an average of 43,000 additional people each day. These tourist visitors will use shops, restaurants, bars and other facilities within Bournemouth, Christchurch and/or East Dorset during their stay. The Tourism in Dorset Report (February 2016) indicates that tourist visitors spent £351 million on shopping and £584 million on food and beverage in the County. This equates to an average of around £9 per visitor per day (£3,285 per annum) on shopping and £14.50 per day (£5,292 per annum) for food and beverages. Unfortunately the Tourism in Dorset Report does not provide a breakdown of retail expenditure between comparison and convenience goods, therefore Lichfields adopts a 70:30 split. An allowance for this spending has been included in the analysis.

4.28 The annual expenditure for the 43,000 visitors per day is £42.40 million for convenience goods, £98.9 million for comparison goods and £227.56 million for food and beverage.

4.29 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 14% from £1,433.95 million in 2017 to £1,630.96 million in 2033, as shown in Table 3 (Appendix 2). Comparison goods spending is forecast to increase by some 73% between 2017 and 2033, increasing from £2,235.52 million in 2017 to

£3,858.65 million in 2033, as shown in Table 3 (Appendix 3). These figures relate to real growth and exclude inflation.

4.30 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

Market Shares/Penetration Rates

4.31 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the April 2017 household survey.

4.32 The household survey is limited to the person who is the main shopper in each household. It is not a representative sample of all adults, and the participating respondents are biased towards females and older adults. The structure of survey under-represents students and other younger adults. In effect the main shopper in the household is identified as the spokesperson to answer about the household's shopping and leisure activity. The survey results do not affect the estimates of expenditure within the study. This information is provided by Experian based on the actual socio-economic and demographic characteristics within of each study area zone. Household surveys of this kind can only provide a broad guide on the distribution, rather than the amount of expenditure available. The results provide a useful basis for modelling existing shopping and leisure patterns, and this is a widely accepted approach within evidence base studies and impact assessments. The results may understate the importance of local shopping facilities and Bournemouth Town Centre, which may be visited more often by students and younger adults, but the overall amount of expenditure attracted by the two Boroughs and the District should be accurate.

4.33 The total turnover of shops within Bournemouth, Christchurch and East Dorset is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel's Retail Rankings and Supermarkets UK Report (November 2015), which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

4.34 The results of the household shopper questionnaire survey undertaken by NEMS in April 2017 have been used to estimate existing shopping patterns within the study area zones. The tabulated results are shown in Appendix 5.

4.35 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top-up shopping.

4.36 The market shares for comparison goods shopping are shown in Table 4 in Appendix 3, and food and beverage (Class A3 to A5) are shown in Table 4 in Appendix 4.

Benchmark Turnover Levels

4.37 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

4.38 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and Lichfields' own on site surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

4.39 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Bournemouth, Christchurch and East Dorset and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores has been adopted. The total benchmark turnover of identified convenience sales floorspace within the main centres in Bournemouth Borough is £447.3 million (Table 9, Appendix 2). The total benchmark turnover of identified convenience sales floorspace within Christchurch Borough is £127.02 million (Table 10, Appendix 2) and the benchmark turnover of facilities in East Dorset is £172.64 million.

4.40 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges between £5,000 to £8,000 per sq.m net. The average sales density for food and beverage outlets is usually around £5,000 per sq.m gross.

Existing Spending Patterns

Convenience Shopping

4.41 The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. A summary of food and grocery shopping patterns for main food shopping trips for selected stores only is shown in Table 4.1 for the core zones (1 to 6), which broadly covers Bournemouth, Christchurch and East Dorset local authority areas.

4.42 The survey results indicate residents in the study area have a wide choice of food stores and there are cross flows of main food shopping trips to and from Bournemouth, Christchurch and East Dorset and neighbouring authority areas, including Poole. Food stores in Bournemouth, Christchurch and East Dorset retain a reasonable proportion of main food and grocery shopping trips generated by residents. Households in the study area have good access to a number of large food stores.

4.43 Table 4 (Appendix 2) indicates the proportion of total convenience goods expenditure (main and top up trips) within each zone attracted to each destination. Collectively Bournemouth, Christchurch and East Dorset retain between 62% and 98% of convenience goods expenditure within the core zones (1 to 6). The lowest retention rates are 62% in Zone 6 (Wimborne) and 63% in Zone 2 (Bournemouth West), where leakage to Poole is significant. The highest retention rates are in Zone 1 (Bournemouth Central) and Zone 3 (East Bournemouth/West Christchurch), both over 98%. The retention rate in Zone 5 (Ferndown/Verwood) is 81%, with most leakage to New Forest District.

Table 4.1 Main Food and Grocery Destinations

Zone	Main Destinations (% Market Share in Zone)
Zone 1 – Bournemouth Central	Tesco Extra, Riverside Avenue, Bournemouth (17.7%) Sainsbury's, Castle Lane West, Bournemouth (19.8%) Asda, Castle Lane West, Bournemouth (19.4%) Asda, Bournemouth (6.4%) Aldi, Stewart Close, Bournemouth (6.9%)
Zone 2 – Bournemouth West	Sainsbury's, Alder Road, Poole (12.5%) Aldi, Wallisdown Road (6.8%) Tesco, Poole Road, Poole (6.7%) Sainsbury's, Castle Lane West, Bournemouth (6.4%) Asda, Castle Lane West (6.2%)
Zone 3 – E. Bournemouth/W. Christchurch	Tesco Extra, Riverside Avenue, Bournemouth (21.9%) Sainsbury's, Lyndhurst Road, Christchurch (14.9%) Waitrose Bargates, Christchurch (10.7%) Asda, Castle Lane West, Bournemouth (10.1%) Aldi, Somerford Road, Christchurch (7.6%) Lidl, Somerford Road, Christchurch (7.3%) Sainsbury's, Castle Lane West (6.4%)
Zone 4 – Christchurch East/Highcliffe	Sainsbury's, Lyndhurst Road, Christchurch (57.1%) Waitrose Bargates, Christchurch (15.0%) Lidl, Somerford Road, Christchurch (7.9%)
Zone 5 – Ferndown/Verwood	Morrison's, Verwood (28.3%) Sainsbury's, Ferndown (20.3%) Tesco, Ferndown (14.9%) Lidl, Ferndown (4.5%)
Zone 6 – Wimborne	Waitrose, Wimborne (21.7%) Sainsbury's, Ferndown (12.4%) Tesco Extra, Waterloo Road (11.9%) Tesco, Poole Road, Poole (10.0%) Lidl, Ferndown (5.8%)

Source: NEMS Household Survey April 2017

4.44 The level of convenience goods expenditure attracted to shops/stores in the three authorities in 2017 is estimated to be (see Table 5 in Appendix 2):

- Bournemouth Borough - £409.90 million;
- Christchurch Borough - £137.71 million; and
- East Dorset District - £184.96 million.

4.45 The total benchmark turnover of existing convenience sales floorspace within the Bournemouth Borough is £447.30 million (Table 9, Appendix 2), compared with the actual turnover of £409.9 million in 2017. Overall Bournemouth has a relatively high retention of convenience goods expenditure and there is only limited potential to increase this level of retention. The base year figures suggest that convenience goods retail sales floorspace in Bournemouth is collectively trading 8.4% below the national average, with an expenditure deficit of -£37.4 million in 2017, the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities. The below average trading performance in Bournemouth suggests existing floorspace can absorb future expenditure growth.

4.46 The total benchmark turnover of existing convenience sales floorspace within Christchurch Borough is £127.02 million (Table 10, Appendix 2), compared with the actual turnover of £137.71 million in 2017. Christchurch also has a relatively high retention of convenience good expenditure and there is only limited potential to increase this level of retention. The base year figures suggest that convenience goods retail floorspace in Christchurch is collectively trading 8.4% above the national average, with an expenditure surplus of +£10.69 million in 2017.

4.47 The total benchmark turnover of identified existing convenience sales floorspace within the East Dorset District is £172.64 million (Table 10, Appendix 2), compared with the actual turnover of £184.96 million in 2017. The base year figures suggest that convenience goods retail sales floorspace in East Dorset is collectively trading 7.1% above the national average, with an expenditure surplus of +£12.32 million in 2017. Surplus expenditure in Christchurch and East Dorset could support future improvements in food store provision. A qualitative analysis of convenience good provision is set out later in this section.

Comparison Shopping

4.48 A summary of comparison goods shopping patterns is shown in Table 4.2. Results are again provided for the core zones (1 to 6), the outer zones (7 to 12) and the study area as a whole. Shopping destinations in Bournemouth, Christchurch and East Dorset retain a reasonable proportion of non-food shopping trips generated by residents in the core area (Zones 1-6), although there is a reasonable level of cross flows to and from Poole. Households in the study area have a good access to a number of shopping destinations. Southampton's regional draw extends into the study area.

Table 4.2 Non-Food Shopping (selected main destinations named by respondents)

Zone	Main Destinations (% Market Share in Zone)
Zone 1 – Bournemouth Central	Castlepoint (47.0%) Bournemouth (19.0%) Boscombe (8.3%) Christchurch (7.2%) Poole (6.4%)
Zone 2 – Bournemouth West	Bournemouth (30.6%) Castlepoint (27.2%) Poole (16.8%) Winton (2.7%) Kinson (2.1%)
Zone 3 – E. Bournemouth/W. Christchurch	Castlepoint (37.1%) Christchurch (22.2%) Bournemouth (10.1%) Christchurch Retail Park (4.5%) Boscombe (3.3%)
Zone 4 – Christchurch East/Highcliffe	Christchurch (33.8%) Bournemouth (19.4%) Castlepoint (14.7%) Southampton (8.3%) Boscombe (2.6%) New Milton (2.5%)
Zone 5 – Ferndown/Verwood	Bournemouth (24.6%) Castlepoint (32.3%) Ferndown (7.9%) Poole (4.8%) Ringwood (4.8%)
Zone 6 – Wimborne	Poole (25.8%) Wimborne Minster (22.0%) Bournemouth (14.9%) Castlepoint (5.7%) Ferndown (3.4%)

Source: NEMS Household Survey, April 2017

4.49 The retention of comparison good shopping trips is lower than for convenience good shopping. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and travel longer distances to visit larger centres that have more range and choice of shops (i.e. Southampton). The survey results indicate that Castlepoint Shopping Centre, Bournemouth town centre and Poole are the main comparison shopping destinations in the core zones followed by Christchurch town centre.

4.50 Table 4 (Appendix 3) sets out the proportion of comparison goods expenditure within each zone that is spent within Bournemouth, Christchurch and East Dorset and neighbouring authority areas. The three authorities retain between 41% and 88% of comparison goods expenditure within six core zones. The highest retention rates are in Zone 3 - East Bournemouth/West Christchurch (88%), Zone 4 – Christchurch East/Highcliffe (87%) and Zone 1 – Central Bournemouth (86%). Zone 2 – Bournemouth West retains 64% with most expenditure leakage going to Poole. Zone 6 – Wimborne has the lowest expenditure retention (41%) with high levels of leakage to Poole and Bournemouth. The Wimborne area falls within the primary catchment area of Poole. The level of comparison goods expenditure attracted to shops/stores in the three authorities in 2017 is estimated to be (see Table 5 in Appendix 3):

- Bournemouth Borough - £874.82 million;
- Christchurch Borough -£171.71 million; and
- East Dorset District - £122.27 million.

4.51 Within Bournemouth Borough, Castlepoint Shopping Centre attracts around 43% of the Borough's total comparison good turnover, compared with 33% attracted to Bournemouth town centre. Boscombe and Winton are the next highest centres with 3.7% and 2.4% of the comparison goods turnover respectively.

4.52 Within Christchurch Borough, Christchurch town centre attracts 65% of the Borough's total comparison good turnover. Highcliffe attracts only 1.2%. Retail warehouses attract 44%. Within East Dorset District, Wimborne attracts around 47% of the District's total comparison good turnover, compared with 27% attracted to Ferndown and 9% attracted to Verwood.

Future Capacity for Convenience Goods Floorspace

4.53 The future level of available convenience goods expenditure at 2023 and 2028 for Bournemouth, Christchurch and East Dorset is shown at Tables 6 to 8 in Appendix 2, with horizon years for 2033. The total level of convenience goods expenditure available between 2017 and 2033 is summarised in Table 11 (Appendix 2). Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. The expenditure projections have been converted into potential new floorspace estimates in Table 12. Expenditure is converted into floorspace estimates based on an assumed average sales density figure of £11,394 per sq.m, the average turnover density of the main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops.

Bournemouth

4.54 Convenience expenditure available to shopping facilities in the Borough is expected to increase from £409.9 million in 2017 to £440.16 million in 2028. Within the Borough, there is an expenditure deficit of -£37.4 million convenience goods expenditure at 2017. This deficit will reduce to -£23.93 million in 2023. Future growth (primarily population growth) will decrease the deficit to -£7.14 million in 2028. The projections suggest there is no need to allocate further sites for convenience goods shopping in Bournemouth for the foreseeable future (up to 2028).

By 2033 there could be a small surplus of £8.65 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term convenience goods expenditure surplus could support a small amount of additional floorspace in line with population growth, 759 sq.m net (1,084 sq.m gross).

4.55 The convenience goods gross floorspace projections are summarised in Table 4.3.

Table 4.3 Summary of Convenience Goods Floorspace Projections (sq.m gross) – Bournemouth

Location	By 2023	By 2028
Bournemouth	0	0

Source: Table 12 in Appendix 2

Christchurch

4.56 Convenience expenditure available to shopping facilities in Christchurch Borough is expected to increase from £137.71 million in 2017 to £154.4 million in 2028. Within the Borough, there is an expenditure surplus of £10.69 million convenience goods expenditure at 2017. Most of this surplus relates to the out of centre Sainsbury's store which is trading above the company average benchmark turnover. The proposed food store commitment at the Beagle site, if implemented, would create an expenditure deficit of -£3.79 million in 2023. Continued population growth would produce a small surplus of £1.97 million in 2028. This surplus at 2028 (£1.97 million) could support only 173 sq.m net (247 sq.m) gross. There is no need to allocate further sites for convenience goods shopping in Christchurch for the foreseeable future (up to 2028).

4.57 By 2033 there could be a small surplus of £7.72 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term the convenience goods expenditure surplus could support a small amount of additional floorspace in line with population growth, 677 sq.m net (967 sq.m gross). The convenience goods gross floorspace projections are summarised in Table 4.4.

Table 4.4 Summary of Convenience Goods Floorspace Projections (sq.m gross) – Christchurch

Location	By 2023	By 2028
Christchurch	0	247

Source: Table 12 in Appendix 2

East Dorset

4.58 Convenience expenditure available to shopping facilities in East Dorset is expected to increase from £184.96 million in 2017 to £193.88 million in 2028. Within East Dorset, there is an available expenditure surplus of £12.32 million convenience goods expenditure at 2017, this surplus relates to the Wimborne area. The household survey results indicate shopping patterns vary significantly within the east and west areas of the District. In the east residents primarily do their food and grocery shopping locally in Ferndown and Verwood, with some outflow to New Forest District. In the west residents primarily do their food and grocery shopping in Wimborne and Poole, with some cross flows to Ferndown. To reflect these patterns, retail capacity has been split for the east and west areas of the District.

4.59 In the east of the District (focused around Ferndown and Verwood) there is a small expenditure deficit at 2017 (-£0.03 million). The implementation of allocated retail facilities at West Parley, North Wimborne commitment and Sainsbury's extension at Ferndown will absorb expenditure growth up to and beyond 2028, with a small deficit of -£0.32 million at 2028. There is no need to allocate further sites, over and above West Parley, for convenience goods shopping in the east area of the District for the foreseeable future (up to 2028).

4.60 By 2033 there could be a small surplus of £3.91 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term the convenience goods expenditure surplus could support a small amount of additional floorspace in line in the east area of the District in line with population growth, 343 sq.m net (491 sq.m gross).

4.61 In the west of the District (focused around Wimborne) there is an expenditure surplus at 2017 (£12.35 million). The implementation of retail facilities at North Wimborne will reduce this surplus to £10.89 million in 2023. The surplus will increase to £12.44 million in 2028. The surplus at 2023 could support 956 sq.m net (1,366 sq.m gross), which would increase marginally to 1,092 sq.m net (1,560 sq.m gross) by 2028, or 1,232 sq.m net (1,760 sq.m gross) by 2033. These projections, summarised in Table 4.5, suggest there is scope for a medium sized food store (about 1,500 sq.m gross) in the west of the District.

Table 4.5 Summary of Convenience Goods Floorspace Projections (sq.m gross) – East Dorset

Location	By 2023	By 2028
East Dorset (east)	0	0
East Dorset (west)	1,366	1,560

Source: Table 12 in Appendix 2

Future Comparison Goods Floorspace Capacity

4.62 The household survey suggests that the retention of comparison goods expenditure is slightly lower than for convenience goods, but remain relatively high within the core zones. Future improvements to comparison retail provision within the three authorities could help to increase market shares within the study area. However developments in neighbouring authorities will limit the ability of shopping facilities to increase their market share of expenditure significantly. Some retail development will be necessary in order to maintain existing market share in the future. Town centre strategies could focus on maintaining market shares in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

4.63 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). It is assumed that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian (Retail Planner Briefing Note 14 – November 2016). Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. The projected turnover of existing floorspace is subtracted from the expenditure projections to provide an estimate of surplus expenditure available to support new floorspace.

4.64 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 10 in Appendix 3, adopting an average sales density of £6,000 per sq.m net in 2017, which is projected to grow by 2% in the future due to improved turnover efficiency.

Bournemouth

4.65 In Bournemouth there is a comparison expenditure surplus of £59.56 million by 2023, increasing to £175.47 million by 2028. The 2028 surplus expenditure could support 23,521 sq.m net (31,361 sq.m gross). Based on the current distribution of comparison goods turnover, the gross floorspace projections are broken down in Table 4.6.

Table 4.6 Summary of Comparison Goods Floorspace Projections (sq.m gross) - Bournemouth

Location	By 2023	By 2028
Bournemouth town centre	3,541	9,629
Boscombe	500	1,299
Castlepoint	5,337	14,152
Other Bournemouth	2,374	6,281
Total	**11,752**	**31,361**

Source: Table 11 in Appendix 3

4.66 By 2033 the surplus could increase to £320.15 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term the comparison goods expenditure surplus could support 38,868 sq.m net (51,824 sq.m gross).

Christchurch

4.67 Taking into account commitments in Christchurch Borough there is a small projected comparison expenditure surplus of £8.13 million by 2023, increasing to £30.73 million by 2028. The 2028 surplus expenditure could support 4,119 sq.m net (5,492 sq.m gross). The gross floorspace projections are summarised in Table 4.7.

Table 4.7 Summary of Comparison Goods Floorspace Projections (sq.m gross) – Christchurch

Location	By 2023	By 2028
Christchurch Borough	1,603	5,492

Source: Table 11 in Appendix 3

4.68 By 2033 the surplus could increase to £59.28 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term the comparison goods expenditure surplus could support 7,197 sq.m net (9,596 sq.m gross).

East Dorset

4.69 Taking into account commitments in East Dorset District there is a small projected comparison expenditure surplus of £1.19 million by 2023, increasing to £15.5 million by 2028. The 2028 surplus expenditure could support 2,077 sq.m net (2,770 sq.m gross). Based on the current distribution of comparison goods turnover, the gross floorspace projections are broken down in Table 4.8.

Table 4.8 Summary of Comparison Goods Floorspace Projections (sq.m gross) – East Dorset District

Location	By 2023	By 2028
East area of the District	0	1,255
West area of the District	364	1,515
Total	**364**	**2,770**

Source: Table 11 in Appendix 3

4.70 By 2033 the surplus could increase to £33.68 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term the comparison goods expenditure surplus could support 4,087 sq.m net (5,452 sq.m gross).

Qualitative Need for Retail Facilities

4.71 The section above quantifies the theoretical capacity to support new retail floorspace within Bournemouth, Christchurch and East Dorset, based on the population and expenditure projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:

- the diversity of uses and deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- levels of expenditure retention and leakage;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Existing Retail Provision

Bournemouth

4.72 As part of the study an audit of the existing retail and service provision in the main centres and comparison to the UK average was undertaken. These assessments are detailed In Volume 2. A summary of existing retail provision is provided in Table 4.9 below.

4.73 Bournemouth Town Centre is the largest shopping destination with 536 Class A1 to A5 units. Boscombe is the next largest centre with 371 Class A1 to A5 units. Charminster, Moordown, Southbourne, Westbourne and Winton all provide over 100 units. The remaining centres are smaller in terms of number of retail units.

4.74 Figure 4.2 shows the proportional mix of Class A within the 13 defined centres in Bournemouth Borough (excluding out of centre food stores and retail warehouses). The mix of Class A units has been compared with Goad Plan national average based on recent land use surveys for over 1,250 town centres across the country. It should be noted that the Goad national average a full range of large, medium and small centres throughout the UK. Smaller centres tend to have a lower proportion of Class A1 comparison shops than larger centres, and conversely a higher proportion of convenience retailing and non-retail services. Nevertheless the comparison with the national average data provides a useful benchmark.

4.75 The mix of uses in most centres varies from the Goad national average. Bournemouth, Winton, Boscombe East, Charminster, Holdenhurst Road, Southbourne Grove, Tuckton and Wallisdown all have a lower than average provision of comparison shops. Charminster has the lowest provision (around 18%), followed by Tuckton (around 19%). Castlepoint has a very strong offer of comparison goods offer (around 57%) due to the purpose built nature of the shopping centre. Moordown also has a strong offer of comparison shops (around 39%) due to the reasonable number of independent specialists for a centre of this size.

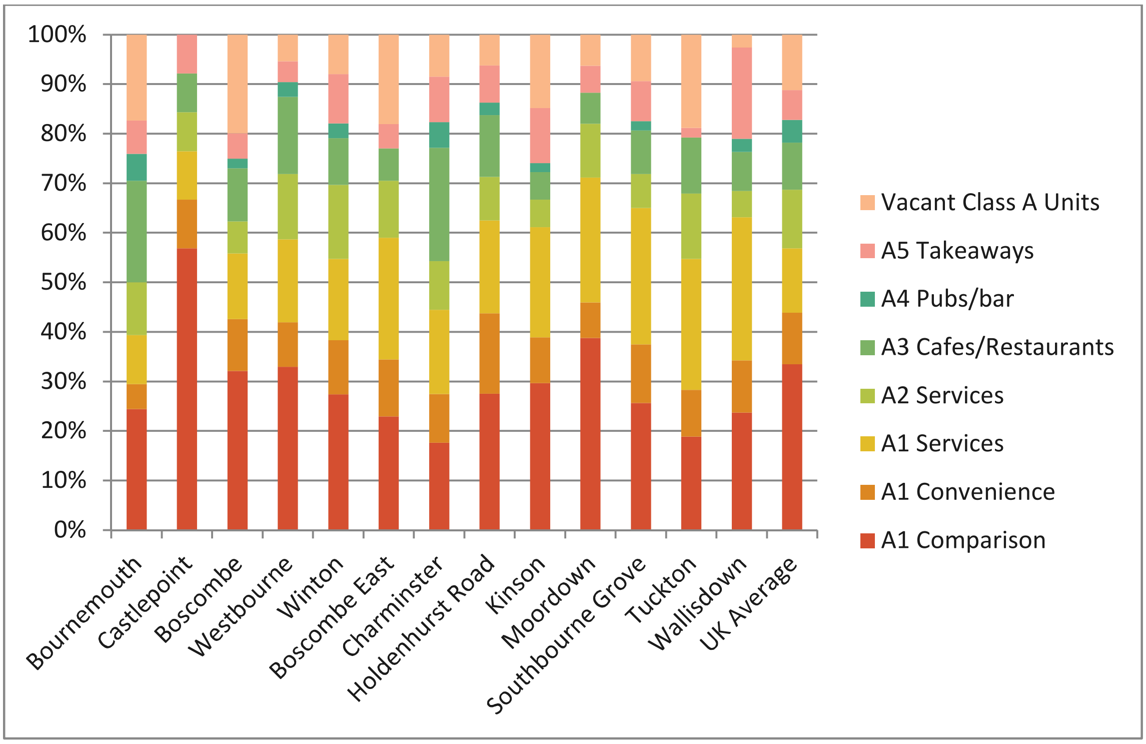
Table 4.9 Shopping Hierarchy

Centre	Town Centre Class A1-A5 Units	Comparison Units	Convenience Units
Bournemouth	536	131	27
Boscombe	371	119	39
Castlepoint	51	29	5
Boscombe East	61	14	7
Charminster	153	27	15
Holdenhurst Road	80	22	13
Kinson	54	16	5
Moordown	111	43	8
Southbourne	160	41	19
Tuckton	53	10	5
Wallisdown	38	9	4
Westbourne	167	55	15
Winton	201	55	22
Total	**2,036**	**571**	**184**

Source: Bournemouth Borough Council's Land Use Survey (January 2017)

4.76 Bournemouth Town Centre, Boscombe, Boscombe East, Kinson and Tuckton all have higher than average vacancy rates, when compared with the national average (between 14 to 20%). Wallisdown, Moordown, Holdenhurst Road, Westbourne and Castlepoint all have significantly lower than average vacancy rates. The provision of Class A3 units is particularly strong in Bournemouth Town Centre and Charminster. There is a reasonable provision of Class A4 units in most centres, the exception to which is Castlepoint, Boscombe East, Moordown and Tuckton where there are no Class A4 units. Wallisdown has a significantly higher than average provision of Class A5 units. A more detailed audit of the town centres is contained within Volume 2.

Figure 4.2 Mix of Class A Uses in Bournemouth's Main Centres



Source: Bournemouth Borough Council's land use survey (January 2017) and Goad National averages for town centres

Christchurch

4.77 An audit of the existing retail and service provision in the main centres and comparison to the UK average was undertaken. These assessments are detailed In Volume 2. A summary of existing retail provision is provided in Table 4.10 below. Christchurch Town Centre is the largest shopping destination with 214 Class A1 to A5 units. Highcliffe is the next largest with 105 Class A1 to A5 units.

Table 4.10 Shopping Hierarchy

Centre	Town Centre Class A1-A5 Units	Comparison Units	Convenience Units
Christchurch	214	77	17
Highcliffe	105	34	7
Total	**319**	**111**	**24**

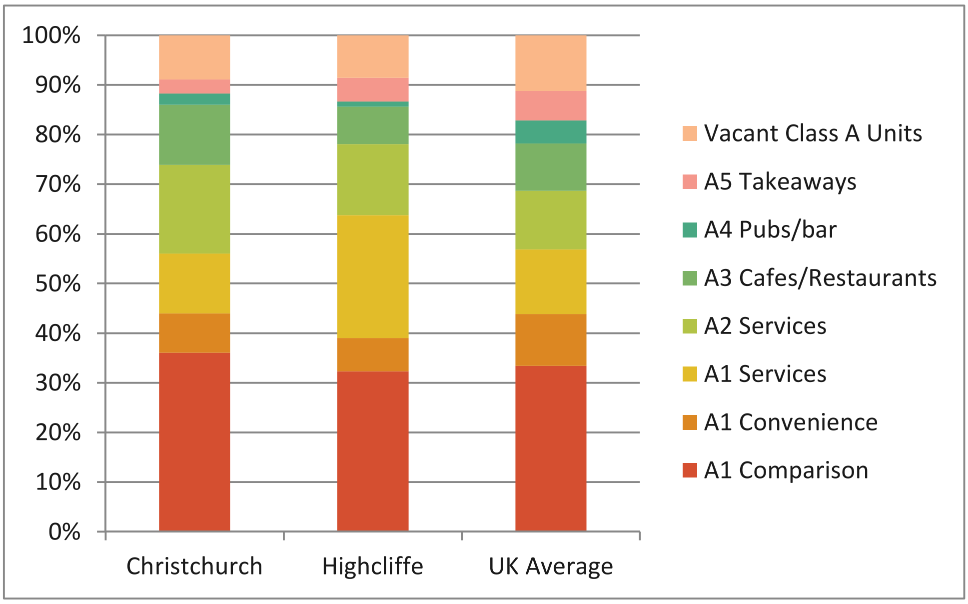
Source: Christchurch and East Dorset Council's Land Use Survey (August 2017)

4.78 Figure 4.3 shows the proportional mix of Class A within the 2 defined centres in Christchurch Borough (excluding out of centre food stores and retail warehouses). As for Bournemouth, the mix of Class A units has been compared with Goad Plan national average.

4.79 Christchurch has a higher than average provision of comparison shops when compared with the national average (around 36%) and Highcliffe has a slightly lower than average provision of comparison shops (around 32%). Both centres have a lower than average vacancy rate (less than

9%). The provision of Class A3 uses in Christchurch is above the national average (around 12%), and below average in Highcliffe (less than 8%). There is a below average provision of Class A4 and Class A5 units in both centres. A more detailed audit of the town centres is contained within Volume 2.

Figure 4.3 Mix of Class A Uses in Christchurch's Main Centres



Source: Christchurch and East Dorset Council's land use survey (August 2017) and Goad National averages for town centres

East Dorset

4.80 An audit of the existing retail and service provision in the main centres and comparison to the UK average was undertaken. These assessments are detailed In Volume 2. A summary of existing retail provision is provided in Table 4.11 below.

Table 4.11 Shopping Hierarchy

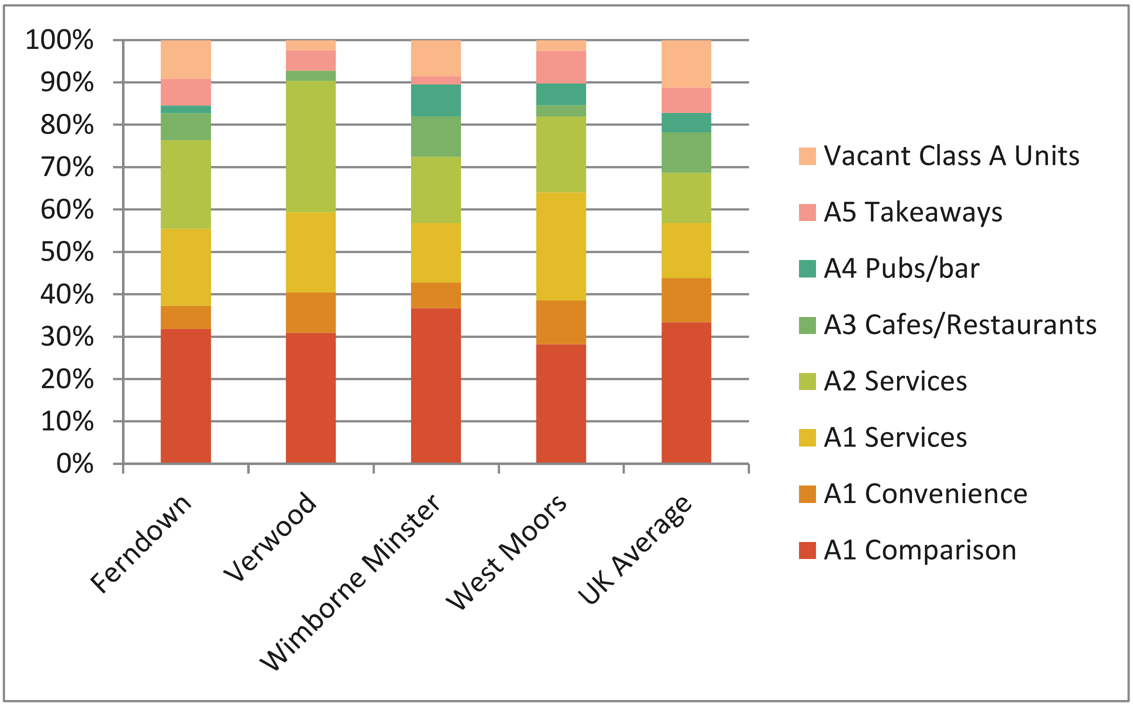
Centre	Town Centre Class A1-A5 Units	Comparison Units	Convenience Units
Ferndown	110	35	6
Verwood	42	13	4
Wimborne Minster	199	73	12
West Moors	39	11	4
Total	**390**	**132**	**26**

Source: Christchurch and East Dorset Council's Land Use Survey (August 2017)

4.81 Wimborne Minster is the largest shopping destination with 199 Class A1 to A5 units. Ferndown is the next largest centre with 110 Class A1 to A5 units. Verwood and West Moors are much smaller with 42 and 39 units respectively.

4.82 Figure 4.4 shows the proportional mix of Class A within the 2 defined centres in East Dorset District (excluding out of centre food stores and retail warehouses). The mix of Class A units has been compared with Goad Plan national average.

Figure 4.4 Mix of Class A Uses in East Dorset's Main Centres



Source: Christchurch and East Dorset Council's land use survey (August 2017) and Goad National averages for town centres

4.83 Wimborne Minster is the only centre with an above average provision of comparison goods shops (around 37%) due to the reasonable number of independent specialists for a centre of this size. All centres have a lower than average vacancy rate; the vacancy rate in Verwood and West Moors is particularly low (less than 3%). There is a below average provision of Class A3 restaurant/café uses in all centres except Wimborne Minster. Wimborne Minster and West Moors both have a higher than average provision of Class A4 pub/bar uses (over 7% and 5% respectively). Verwood does not have any Class A4 units. Both Ferndown and West Moors have a slightly higher than average provision of Class A5 takeaway units. A more detailed audit of the town centres is contained within Volume 2.

Convenience Goods Shopping

4.84 Most households undertake two types of food and grocery shopping trips i.e. a weekly or less frequent main or bulk shopping trip and more regular top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of main shopping trip. Accessibility and convenience are more important for top up shopping trips.

4.85 **Bournemouth Town Centre, Boscombe, Boscombe East, Castlepoint, Charminster, Holdenhurst Road** and **Moordown** are located in **Zone 1**. Convenience shopping provision in Bournemouth Town Centre is below the Goad national average in terms of the proportion of shop units. Despite this, there are a number of larger supermarkets contained within the Town Centre, including an Asda Superstore (5,465 sq.m net), Lidl (735 sq.m net) and a Tesco Metro (1,377 sq.m net), alongside a number of other smaller convenience stores. There is also a large out of centre Tesco Extra (6,263 sq.m net).

4.86 Boscombe has a slightly higher than average convenience shopping provision, and has a number of larger stores including, Aldi (941 sq.m net), Lidl (1,199 sq.m net) and Sainsbury's (1,840 sq.m net), alongside a number of other small convenience stores.

4.87 Castlepoint has a number of large format convenience stores; an Asda Superstore (5,885 sq.m net), M&S Foodhall (1,628 sq.m net) and Sainsbury's (4,569 sq.m net).

4.88 Holdenhurst Road has an Aldi (969 sq.m net) and Boscombe East, Charminster and Moordown's convenience offer is limited to smaller stores. The provision of convenience goods shopping within these smaller settlements is consistent with the role and nature of these centres. Residents will look to larger stores in Bournemouth, Boscombe and Castlepoint to meet their main bulk food shopping needs.

4.89 Convenience goods expenditure retention, Bournemouth Town Centre retains 7.6% within Zone 1. Castlepoint retains a much higher amount at 35.6%. There is very limited leakage outside of Zone 1, with Bournemouth Borough retaining 92% of convenience goods expenditure.

4.90 Based on the choice of food stores, mix of uses in the town centres and the high expenditure retention in Castlepoint, Zone 1 is well served in terms of convenience goods shopping provision.

4.91 **Kinson, Winton, Westbourne** and **Wallisdown** are located in **Zone 2**. Kinson has a large Tesco Superstore in the centre (2,241 sq.m net). Winton also has a number of larger convenience stores, including Waitrose (1,597 sq.m) and Lidl (928 sq.m net), alongside a number of other smaller convenience shops. Westbourne has an M&S Simply Food (1,043 sq.m) and is supported by a number of other smaller convenience shops, including Coop, Tesco Express and Iceland. Wallisdown has an Aldi in the centre (864 sq.m net) and is supported by a number of other smaller convenience shops including an off-licence and a Tesco Express.

4.92 Convenience goods expenditure retention, Kinson, Winton and Westbourne retain 24% in Zone 2. The overall expenditure retention for Bournemouth Borough in Zone 2 is reasonable at around 58%. The majority of the expenditure leakage from Zone 2 is attracted to food stores in Poole (around 36%).

4.93 Based on the choice of food stores and reasonable expenditure retention, Zone 2 is well served in terms of convenience goods shopping provision.

4.94 **Southbourne Grove** and **Tuckton** are located in **Zone 3**. Convenience shopping provision in Southbourne Grove is higher than the Goad national average in terms of the proportion of shop units. Southbourne Grove has a number of small convenience stores suitable for day to day/top-up shopping, which are supported by bakeries, greengrocers and a butcher. Tuckton has a slightly lower than average provision of convenience shops. Despite this, Tuckton is well served for day to day/top-up shopping needs, with a small Coop and Tesco Express, together with two butchers and a newsagent.

4.95 Convenience goods expenditure retention in Zone 3, Bournemouth Borough retains around 51%. Most of the expenditure leakage is attracted to large food stores in Christchurch (around 23%). Christchurch's natural catchment area extends into Zone 3. Zone 3 is well served in terms of convenience goods shopping provision.

4.96 **Christchurch Town Centre** and **Highcliffe** are located in **Zone 4**. Christchurch Town Centre has a significantly lower than average provision of convenience units when compared with the Goad national average. In the Town Centre there is a large Waitrose (2,571 sq.m net) and an M&S Simply Food (965 sq.m net). These stores are supported by a number of other smaller convenience shops including newsagents and sandwich shops. The main food stores in Christchurch are out of centre and include a large format Sainsbury's (5,643 sq.m net), Aldi (982 sq.m) and Lidl (940 sq.m net).

4.97 Highcliffe also has a significantly lower than average provision of convenience units when compared with the Goad national average. There is a Coop (673 sq.m net) and a Tesco Express

(232 sq.m net) in the District Centre. These stores are supported by a number of other smaller convenience stores including a newsagent, butchers and delicatessen.

4.98 Convenience goods expenditure retention, collectively Christchurch Town Centre and Highcliffe retain around 17% of expenditure in Zone 4. The majority of convenience goods expenditure is attracted to the large out of centre food stores in the Borough (around 63%). Overall, convenience goods expenditure retention in Zone 4 for Christchurch Borough is high (around 88%). Based on the choice of food stores, mix of uses in the town centres and the high expenditure retention, Zone 4 is well served in terms of convenience goods shopping provision.

4.99 **Ferndown** and **Verwood Town Centres** and **West Moors District Centre** are located in **Zone 5**. Convenience shopping provision in Ferndown is significantly below the Goad national average in terms of the proportion of shop units. The centre has a large Tesco (3,293 sq.m net), and is supported by some smaller convenience units. There are a number of out of centre convenience stores including, Sainsbury's (4,101 sq.m net) and M&S Foodhall (943 sq.m net).

4.100 Verwood has a slightly lower than average provision of convenience stores. In the centre there is a small Tesco Express (254 sq.m net). This is supported by a butcher and a greengrocer. The main supermarket is the large out of centre Morrison's (3,303 sq.m net).

4.101 West Moors has a higher than average provision of convenience stores when compared with the Goad national average. In the centre there is a Tesco Express (254 sq.m net) and a Coop (212 sq.m net). These stores are supported by two butchers. The provision is suitable for day to day/top-up shopping needs.

4.102 Convenience goods expenditure retention, collectively Ferndown and Verwood retain 73% of expenditure in Zone 5. West Moors retains only 1% of convenience goods expenditure in Zone 5. The majority of the leakage in Zone 5 is attracted to the New Forest District (around 15%). Overall, Zone 5 is well served in terms of convenience goods shopping provision.

4.103 **Wimborne Town Centre** is located in **Zone 6.** Convenience shopping provision in Wimborne Minster is significantly below the Goad national average in terms of the proportion of shop units. Despite this, within the centre this is a large Waitrose store (1,651 sq.m net) and a Coop (1,168 sq.m net). These larger stores are supported by a number of smaller convenience units, including a butchers and a number of bakeries.

4.104 Convenience goods expenditure retention, Wimborne retains around 36% in Zone 6. Around 16% of convenience goods expenditure in Zone 6 is leaked to nearby Ferndown. Around 32% of convenience goods expenditure is attracted to large food stores in Poole. Despite this, Wimborne Minster retains a reasonable level of convenience goods expenditure for a centre of its size. Overall, Zone 6 is well served in terms of convenience goods shopping provision.

4.105 In summary, food store and convenience retail provision is strong across the six zones. Large food stores (over 1,000 sq.m net) suitable for main and bulk food shopping are focused in the main centres i.e. Bournemouth, Christchurch, Castlepoint and Ferndown. These stores provide a good distribution of facilities which are widely accessible. The smaller district and local centres provide a number of small food stores suitable for day to day and top up shopping.

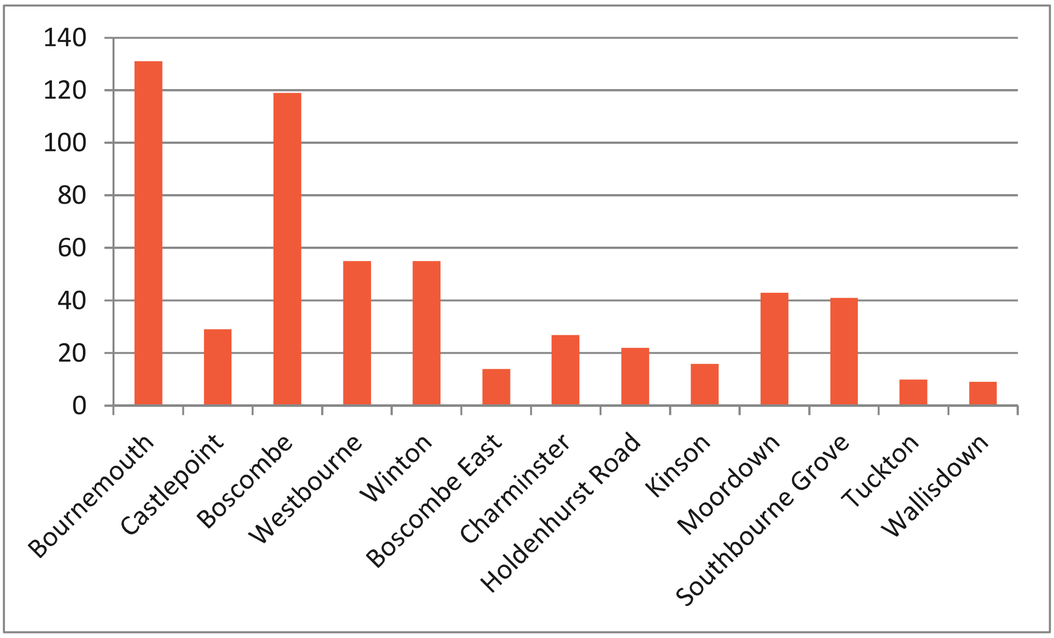
4.106 There are no identified areas of qualitative deficiency in food store provision within Bournemouth, Christchurch or East Dorset.

Comparison Shopping

Bournemouth

4.107 Within the 13 designated centres in Bournemouth Borough there are 571 comparison shops. Figure 4.5 indicates that Bournemouth is the main comparison shopping centre in Bournemouth Borough in terms of number of comparison units, and provides a good range and choice of comparison goods shopping facilities.

Figure 4.5 Comparison Goods Retail Units in Bournemouth Borough



Source: Bournemouth Borough Council Land Use Survey January 2017

4.108 The proportion of Class A1 comparison good shops in Castlepoint (56.9%), Boscombe (32.1%), Westbourne (32.9%) and Moordown (38.7%) is comparable or above the Goad national average (33.4%). Castlepoint has a particularly strong comparison goods offer due to the purpose built nature of the shopping centre.

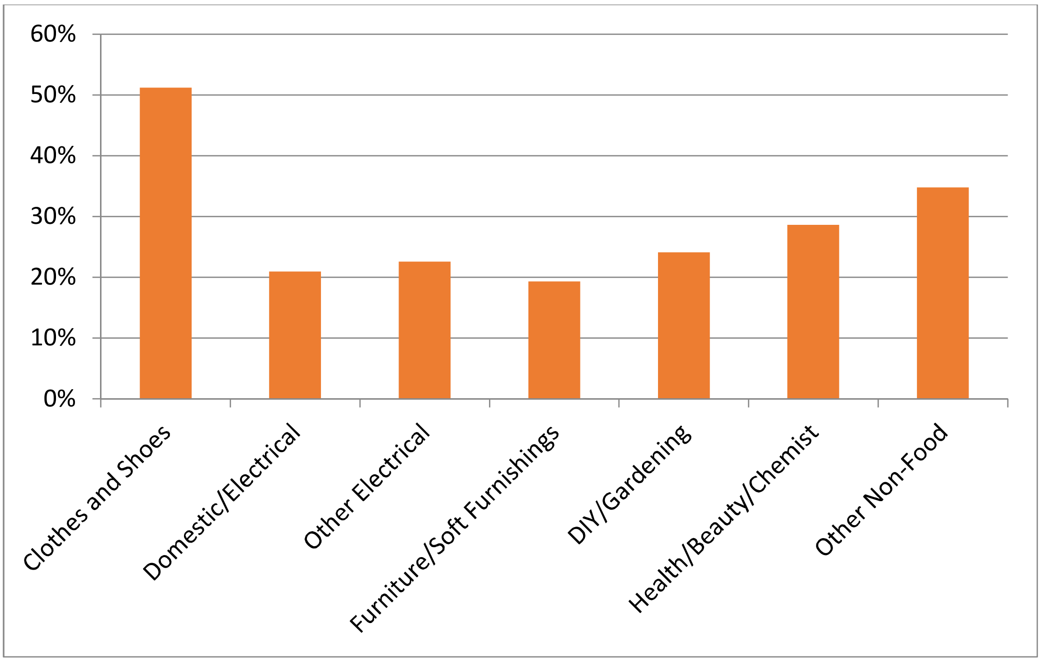
4.109 The comparison good retail offer is predominantly small independent specialist traders, particularly within the smaller centres. There is a much larger selection of multiple comparison retailers in Bournemouth town centre and at Castlepoint. Multiple outlets within the smaller centres are primarily charity shops.

4.110 Bournemouth Borough has a good provision of retail warehouses. There are 5 retail parks within the Borough (Mallard Road Retail Park, Turbary Retail Park, Westover Retail Park, Ringwood Road Retail Park and Parkway Retail Park). Homebase, Wickes and B&Q are the main DIY stores in the Borough. The furniture/soft furnishing sector is represented by Dunelm, The Range, Carpet Right and Bensons for Beds. The electrical sector is represented by Curry's/PC World. Other outlets include Argos, Sports Direct, Brantano, Matalan, Smyths Toys, JYSK, Pets at Home, Cotswold Outdoor, Halfords and Staples. Residents in Bournemouth Borough also have access to retail parks within Christchurch (Christchurch Retail Park, Meteor Shopping Park and Stony Lane Retail Park) and also in Poole.

4.111 The household survey results indicate that Bournemouth Borough retains a reasonable market share of DIY/hardware expenditure and electrical goods, furniture, soft furnishings and floor-covering expenditure, however there is a relatively high amount of expenditure leakage to Poole, which reflects the wider range of retail warehouses available in Poole.

4.112 The household survey results suggest Bournemouth Borough attracts around 34% of comparison goods expenditure within the study area. A breakdown of expenditure attraction is shown in Figure 4.6.

Figure 4.6 Comparison Goods Expenditure Retention in Bournemouth Borough



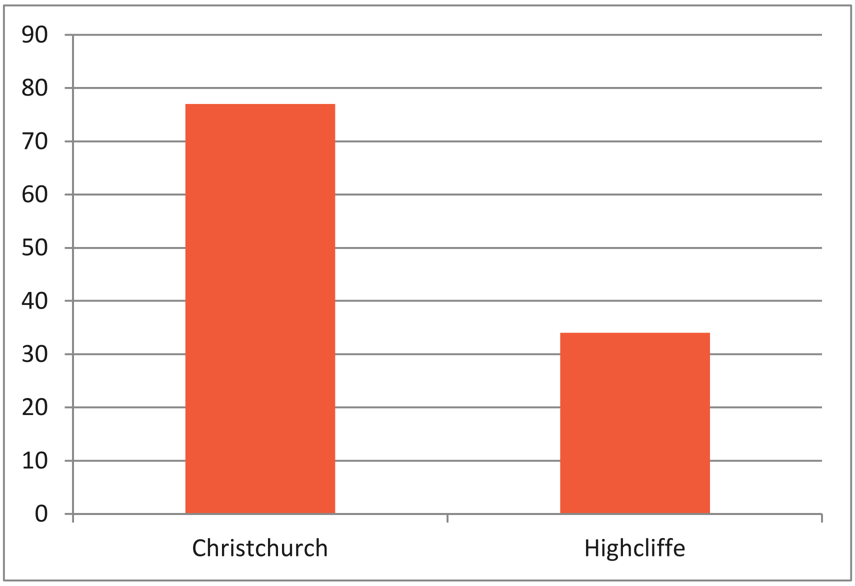
Source: NEMS Household Survey April 2017 (last shopping destination for comparison goods)

4.113 The results show Bournemouth Borough has a reasonably high level of expenditure retention for clothes and shoes, but a lower retention for the other product categories. Clothing and footwear are generally higher order comparison goods that tend to be bought on an occasional basis, where customers are most likely to shop around and compare products in different shops. Whilst Bournemouth and Castlepoint are the main destinations in the Borough for these types of shopping trips, other nearby centres, such as Poole, also attract these types of shopping trips. Customers are usually prepared to tend to travel further to purchase these items and would not expect to find a wide choice within smaller local centres.

Christchurch

4.114 Within the 2 designated centres in Christchurch Borough, there are 111 comparison shops. Figure 4.7 indicates that Christchurch is the main comparison shopping centre in Christchurch Borough in terms of number of comparison units, and provides a good range and choice of comparison goods shopping facilities.

Figure 4.7 Comparison Goods Retail Units in Christchurch Borough



Source: Christchurch and East Dorset Councils Land Use Survey August 2017

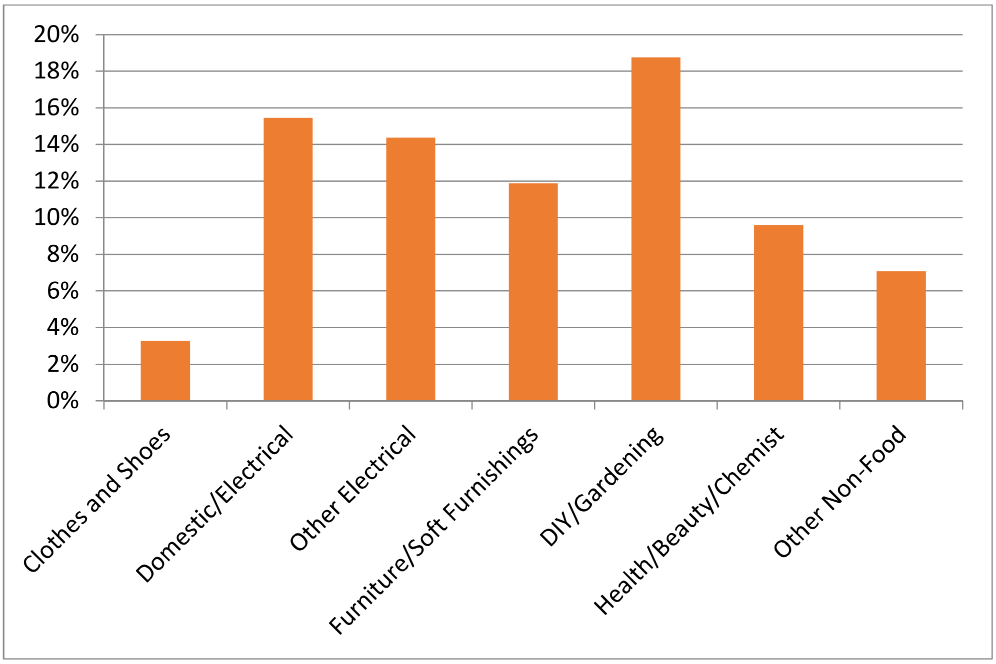
4.115 The proportion of Class A1 comparison good shops in Christchurch (36%) is above the Goad national average (33.4%) for all town centres. Highcliffe has a slightly lower than average proportion of Class A1 comparison good shops (32.4%). The comparison good retail offer in Christchurch is a mix of national multiples and small independent specialist traders. Highcliffe is predominantly small independent specialist traders.

4.116 Christchurch Borough has a reasonable provision of retail warehouses. There are 3 retail parks within the Borough (Christchurch Retail Park, Meteor Shopping Park and Stony Lane Retail Park). Homebase, B&Q and Wickes are the main DIY stores in the Borough. The furniture/soft furnishing sector is represented by Harvey's and Carpet Right. The electrical sector is represented by Maplin. Other outlets include Halfords, Pets at Home, Magnet, Tile Giant, Bathstore, TK Maxx, Sports Direct, Matalan and Poundland. Residents in Christchurch Borough also have access to retail parks within Bournemouth (Castlepoint, Mallard Road Retail Park, Turbary Retail Park, Westover Retail Park, Ringwood Road Retail Park and Parkway Retail Park).

4.117 The household survey results indicate that Christchurch Borough retains a relatively low market share of DIY/hardware expenditure and electrical goods expenditure. The retention of expenditure for other categories however, such as furniture and health, is much lower. There are high levels of expenditure leakage to nearby Bournemouth and Poole, where the choice and range of retail warehouses is more extensive.

4.118 The household survey results suggest Christchurch Borough attracts only around 9% of comparison goods expenditure within the study area overall. Based on our experience, this market share is typical for smaller lower tier centres where the catchment areas of larger sub-regional centres overlap. A breakdown of expenditure attraction in the study area is shown in Figure 4.8.

Figure 4.8 Comparison Goods Expenditure Retention in Christchurch



Source: NEMS Household Survey April 2017 (last shopping destination for comparison goods)

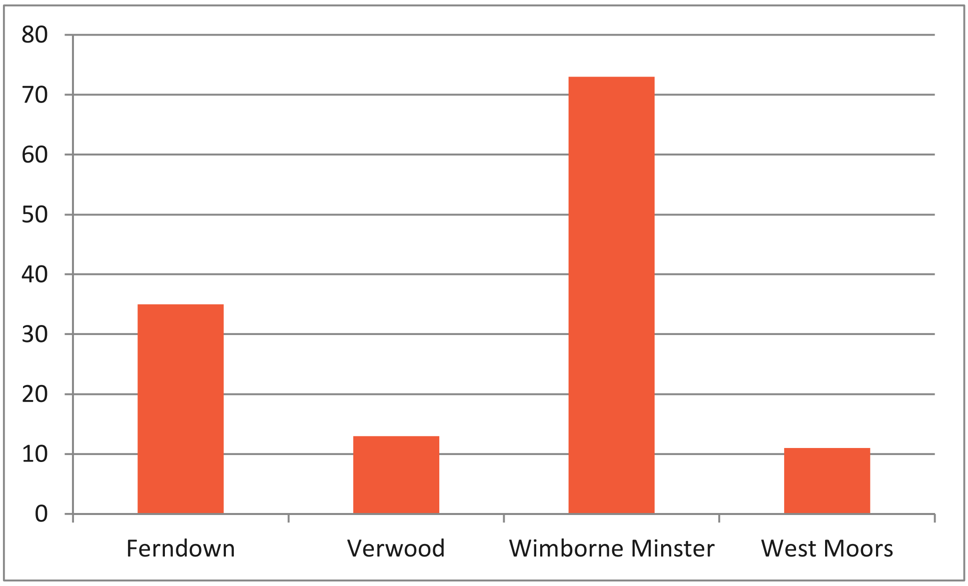
4.119 Christchurch Borough has a very low level of expenditure retention for clothes and shoes, lower than the other categories. Clothing and footwear are generally higher order comparison goods that tend to be bought on an occasional basis, where customers are most likely to shop around and compare products in different shops. Bournemouth and Castlepoint are both located in close proximity to Christchurch and offer a much wider variety of comparison goods shops. Customers are usually prepared to travel further to purchase these items and would not expect to find a wide choice within smaller centres.

East Dorset

4.120 Within the 4 designated centres in East Dorset, there are 132 comparison shops. Figure 4.9 indicates that Wimborne Town Centre is the main comparison shopping centre in East Dorset in terms of number of comparison units, and provides a good range and choice of comparison goods shopping facilities, with a wide variety of independent retailers, relative to its size.

4.121 The proportions of Class A1 comparison good shops in Ferndown and Wimborne Town Centres are comparable or above the Goad national average. The proportion of Class A1 comparison goods shops in West Moors is slightly below the Goad national average. In Verwood, the proportion is significantly below the national average. Wimborne offers a wide range of comparison goods shops, predominantly comprising small independent specialist traders. The other centres also comprise small independent specialist comparison traders, albeit the choice is more limited.

Figure 4.9 Comparison Goods Retail Units in East Dorset

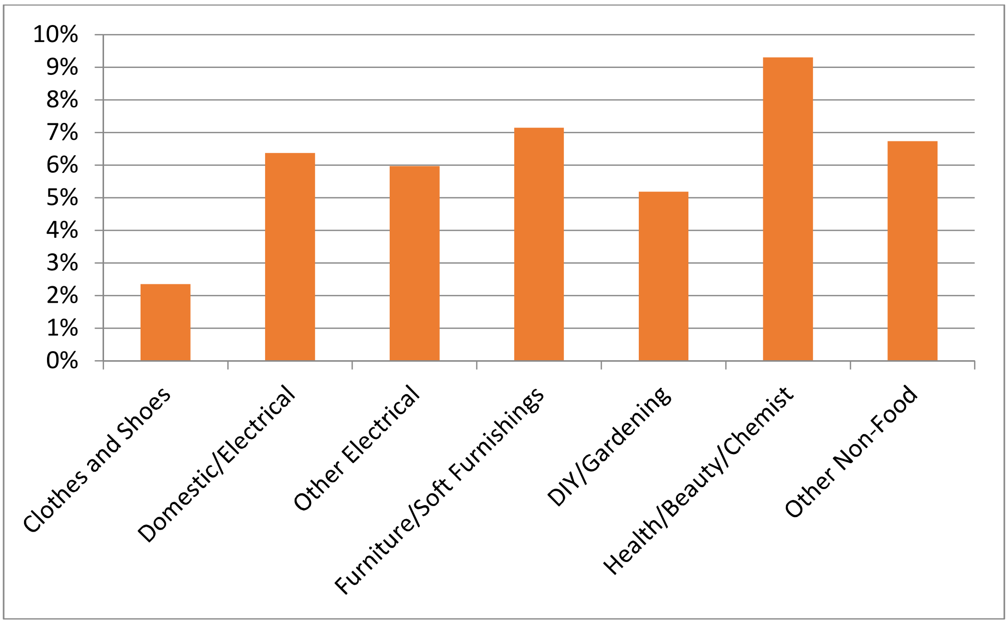


Source: Christchurch and East Dorset Councils Land Use Survey August 2017

4.122 East Dorset has a very limited provision of retail warehouses. There is a limited number of individual retail warehouse units along Ringwood Road. As detailed above, nearby Christchurch, Bournemouth and also Poole offer a much wider choice of retail warehouse units, where shoppers can access a selection of national bulky goods retailers.

4.123 The household survey results indicate that East Dorset attracts a low market share for all comparison goods expenditure categories. As expected, there are very high levels of leakage to Bournemouth, Christchurch and Poole which offer significantly more choice, in particular in Bournemouth town centre, Castlepoint and Poole. The household survey results suggest East Dorset attracts only around 5% of comparison goods expenditure overall. Based on our experience, this low market share is typical for a relatively rural authority where there is no large town/regional centre offering a wide variety and choice of large national comparison goods retailers. A breakdown of expenditure retention is shown in Figure 4.10.

Figure 4.10 Comparison Goods Expenditure Retention in East Dorset



Source: NEMS Household Survey April 2017 (last shopping destination for comparison goods)

4.124 **Bournemouth Town Centre, Boscombe, Boscombe East, Castlepoint, Charminster, Holdenhurst Road** and **Moordown** are located in **Zone 1**. Bournemouth Town Centre, whilst located in Zone 1, the household survey results confirm that the centre serves customers across all 12 study area zones. The proportion of Class A1 comparison units within the town centre (131 – 24%) is lower than the Goad national average. In terms of comparison goods expenditure retention, Bournemouth Town Centre retains around 16% in Zone 1 which is relatively low considering it is the main centre in the Borough. A significant amount of the comparison goods expenditure within Zone 1 is attracted to Castlepoint (around 42%), reflecting its role as a purpose built shopping centre. Boscombe, Boscombe East, Charminster, Holdenhurst Road and Moordown collectively retain just over 6% of comparison goods expenditure within Zone 1. In Zone 1, there is some leakage of expenditure to Poole (around 11%).

4.125 **Kinson, Winton, Westbourne** and **Wallisdown** are located in **Zone 2**. These settlements have smaller centres with a more limited number of comparison shops. Winton and Westbourne are the largest centres in this zone (both with 55 comparison goods units). The provision of comparison goods shops in Westbourne is broadly in line with the Goad national average, however the provision in Winton is below the Goad national average. Kinson and Wallisdown also have a lower provision of comparison goods shops when compared to the Goad national average. Collectively, these centres in Zone 2 retain just over 6% of comparison goods expenditure, reflecting their more limited choice in terms of comparison shops. The natural catchment areas of these towns extend into Zone 1, and in particular Bournemouth Town Centre and Castlepoint adequately serve this area. There is however a relatively high level of comparison goods expenditure which is leaked outside the Borough to Poole (around 33%).

Southbourne Grove and **Tuckton** are located in **Zone 3**. The proportion of Class A1 comparison units within both centres is lower than the Goad national average. In terms of comparison goods expenditure retention, collectively these centres retain a very small percentage in Zone 3 (around 2%), reflecting the more limited choice of comparison goods shops available in each centre. Bournemouth Town Centre and Castlepoint in particular adequately serve Zone 2, with relatively high levels of comparison goods expenditure attracted to these centres. A fairly high amount of expenditure (around 21%) leaks from Zone 3 to Christchurch Town Centre in Zone 4 as naturally these catchment areas overlap.

4.126 **Christchurch Town Centre** and **Highcliffe District Centre** are located in **Zone 4**. The proportion of Class A1 comparison units within Christchurch Town Centre is higher than the Goad national average (83 units – 39%). The provision of comparison goods shops in Highcliffe is just below the Goad national average. Christchurch Town Centre retains around 34% of comparison goods expenditure in Zone 4. Highcliffe retains very low levels of comparison goods expenditure in Zone 4 (less than 1%). The comparison goods shopping offer is weak in Highcliffe as the centre has a very limited choice and predominately comprises charity shops/second hand shops. Out of centre retail parks in Christchurch attract around 18% of comparison goods expenditure in Zone 4. There is some leakage to Bournemouth Town Centre (around 9%) and Castlepoint (around 19%).

Ferndown and **Verwood Town Centre** and **West Moors District Centre** are located in **Zone 5**. The proportion of Class A1 comparison units within Ferndown is broadly consistent with the Goad national average. The proportion of Class A1 comparison units within Verwood and West Moors is below the Goad national average. Collectively, these centres retain around 19% of comparison goods expenditure in Zone 5. There is a large flow of expenditure outside of East Dorset to Castlepoint (around 39%). There is also some leakage to Poole (around 11%).

4.127 **Wimborne Town Centre** is located in **Zone 6.** The proportion of Class A1 comparison units within Wimborne Minster is above the Goad national average. Wimborne Minster offers a wide range of comparison goods shops, predominantly comprising small independent specialist traders. In terms of comparison goods expenditure retention, Wimborne Minster retains around 21% in Zone 6 which is good for a centre which predominately comprises small independent specialist traders. There is however a large flow of expenditure outside of East Dorset to Poole (around 52%), reflecting the ease of access to Poole.

4.128 In summary, comparison goods retail provision is reasonably strong in Bournemouth Borough and is primarily concentrated in Bournemouth Town Centre and Castlepoint. In Christchurch Borough comparison goods retail provision is weaker, but Christchurch Town Centre offers the main concentration of comparison goods shops, albeit the choice of national multiples is relatively limited. Comparison goods shopping in East Dorset is weak, as demonstrated by the higher level of expenditure leakage for these types of goods. The exception to this is Wimborne Minster, which has a relatively good level of comparison goods expenditure retention for a centre which predominately comprises independent specialist traders.

4.129 Given the complex nature of shopping patterns within the study area, crossflows of comparison expenditure are likely to continue in the future. Investment will be needed in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for Bournemouth, Christchurch and East Dorset should be to maintain the shopping role and market share within the region, in the face of increasing competition. The economic projections in this section assume that new development will retain the share of comparison expenditure in the study area and will help to maintain this share in the future.

5.0 Requirements for Other Town Centre Uses

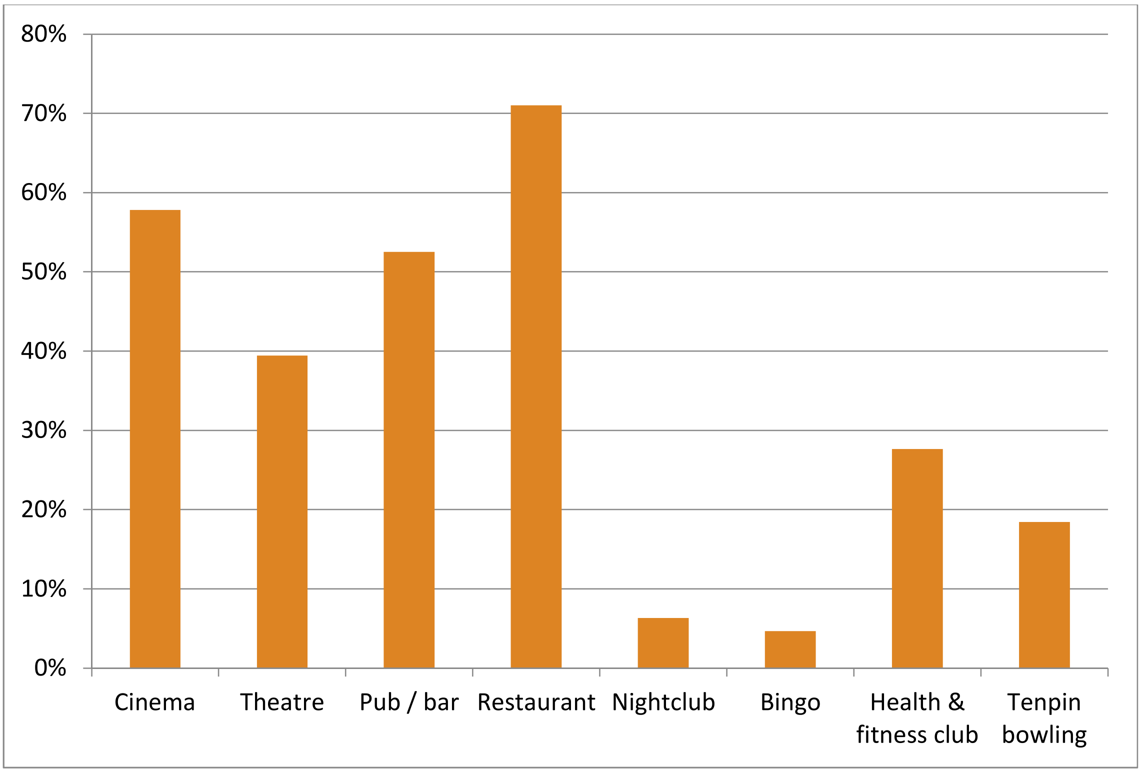
Introduction

5.1 This section assesses the potential for commercial leisure and town centre uses in Bournemouth, Christchurch and East Dorset, including theatres, cinemas, ten pin bowling, bingo, health and fitness, restaurants/cafes, pubs/bars and takeaways/fast food. The analysis excludes less intensive sports uses that are not necessarily considered to be main town centre uses, e.g. sports hall and pitches. The joint Bournemouth and Poole Sports Strategy and Action Plan sets out the strategy for sports provision for the Bournemouth and Poole area.

5.2 The Bournemouth and Poole Strategy looks ahead to the year 2026, and what might be needed for an increasing population who want to play sport in future years. It sets out a 'direction of travel' for sports provision in the future and what might be needed to enable that change.

5.3 Household survey respondents were asked about their family's leisure activities. The participation rates within the study area are shown in Figure 5.1. An assessment of these sectors and the main destinations for these activities are set out in this section.

Figure 5.1 Leisure Participation (% of Respondents)



Source: NEMS Household Survey April 2017

5.4 The household survey identifies that visiting restaurants (71%) is the most popular leisure activity, followed by visiting cinemas (58%), pubs/bars (53%) and theatres (39%).

Commercial Leisure Uses

5.5 Residents in Bournemouth Borough have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and good access in the surrounding area, in particular in Poole, outside of the Borough.

5.6 Residents in Christchurch Borough have reasonable access to a range of commercial leisure and entertainment facilities within the Borough, and good access in the surrounding area, in particular, in Bournemouth, Poole and Southampton, outside of the Borough.

5.7 Residents in East Dorset have more limited access to a range of commercial leisure and entertainment facilities, but have good access in the surrounding area, in particular Christchurch, Bournemouth, Southampton and Poole, outside of the Borough.

5.8 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from clustering together for example on out of centre leisure parks.

Cinemas

5.9 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2016 UK national average is 2.6 trips per person.

5.10 The Cinema Advertising Association identities 788 cinema facilities with 4,194 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seat against projected customer cinema trips across the country, in order to identify areas of under and over-provision. The latest (2016) national average is about 40,000 cinema trips per screen per annum, or 210 trips per seat per annum.

5.11 In Bournemouth Borough, the ABC and Odeon cinemas, which were both located on Westover Road, closed earlier this year. Odeon has recently opened a new cinema in Bournemouth Town Centre (the Odeon BH2). This cinema provides 10 screens and 1,686 seats (source: UK Cinemas).

5.12 In Christchurch Borough, residents have more limited access to cinemas, with the only cinema in the Borough being the Regent Centre in Christchurch Town Centre which has 1 screen and 484 seats.

5.13 In East Dorset, residents also have limited access to cinemas, with the only cinema being the Tivoli Theatre in Wimborne Minster which has 1 cinema screen and 500 seats. The cinema provision in East Dorset is however complemented by a Cinema Club at the Verwood Hub, providing a recent film showing once a week. This service is small and does not offer the choice of films shown at large multiplex cinemas.

5.14 The study area is also served by cinemas in Poole. The Cineworld in Poole has 16 screens and 2,396 seats. The Lighthouse has one screen and 103 seats. Total provision within the study area is 29 screens and 5,169 seats.

5.15 The study area population in 2017 (672,392 people) will generate 1.75 million cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). The tourist population (an average of 43,000 people per day spread throughout the year) would generate a further 111,800 cinema trips per annum. The number of trips generated in each zone is shown in Table 1 in Appendix 5.

5.16 The survey results have been adopted to calculate the market share of trips attracted to each cinema destinations as shown in Table 2 in Appendix 5. The distribution of cinema trips in 2017 is shown in Table 3 in Appendix 5. Bournemouth Borough attracts approximately 29% of cinema trips from the study zones. Christchurch Borough attracts around 8% of cinema trips from the study zones and East Dorset attracts almost 3% of cinema trips from the study zones. Poole is the main cinema destination within the study area attracting over 40% of cinema trips. In total existing cinemas in Bournemouth, Christchurch and East Dorset attract 839,668 trips in 2017. Based on an average 210 trips per seat existing cinema would be expected to attract 560,700 trips per annum. These figures suggest existing cinemas attract significantly more trips than the national average, on the basis the catchment population generates the same average number of trips per person.

5.17 The cinema trip patterns are projected to 2023, 2028 and 2033 in Tables 4, 5 and 6 in Appendix 5. The results are summarised in Table 8 and surplus trips are converted into additional seats. The theoretical capacity results are shown in Table 5.1 below.

Table 5.1 Cinema Seat Capacity Projections

Location	By 2023	By 2028
Bournemouth	1,319	1,425
Christchurch	334	362
East Dorset	0	0
Total	**1,653**	**1,788**

Source: Table 7 in Appendix 5

5.18 These projections suggest that there is theoretical capacity for a further cinema within the study area, with at least 1,600 seats (8 to 10 screens). However the presence of two large multiplex cinemas (Cineworld in Poole and the Odeon in Bournemouth) may limit operator demand for an additional facility particularly in the short term up to 2023, and possibly up to 2028.

Theatres

5.19 In total 39% of respondents to the household survey indicated that they visit the theatre. When asked where they had last visited the theatre, the following main destinations were mentioned are shown in Table 5.2.

Table 5.2 Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Southampton	23.1
Bournemouth	21.8
Poole	18.0
Central London	13.4
Wimborne Minster	8.9
Christchurch	6.9

Source: NEMS Household Survey April 2017

5.20 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UKTheatre's membership).

5.21 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the Bournemouth, Christchurch and East Dorset study area population in 2017 (672,392 people) generates 336,196 theatre trips per annum. When taking into account tourists (43,000 people), this would generate an additional 21,500 theatre trips per annum.

5.22 Based on the market shares in Table 5.2, about 78,000 trips will be attracted to Bournemouth Borough, about 25,000 trips to Christchurch Borough and about 32,000 trips to East Dorset District.

5.23 These figures when compared with the British Theatre Consortium, British Theatre Repertoire average of around 121,000 visits per venue suggest that the existing theatres provide adequate provision. There is no clear need for additional theatre provision in Bournemouth, Christchurch or East Dorset in the plan period.

Private Health and Fitness Clubs

5.24 As indicated above, the joint Bournemouth and Poole Sports Strategy and Action Plan sets out the strategy for sports provision, including sports halls, swimming pools and other sports facilities. This strategy indicates there is a clear need for additional swimming pool provision in Bournemouth up 6 additional 25m lanes. This section assesses the potential need for commercial health and fitness clubs, which are main town centre uses.

5.25 The household survey indicates that 28% of respondents or their families visit health/fitness clubs. Of the participating households, the main destinations mentioned are summarised in Table 5.3.

5.26 Bournemouth Borough attracts about 34% of health and fitness facilities trips within the study area. Christchurch Borough attracts about 4.5% of health and fitness facilities trips within the study area and East Dorset attracts about 16% of health and fitness facilities trips within the study area. The household survey results suggest respondents tend to use local facilities or facilities close to their place of work.

Table 5.3 Main Health and Fitness Club Destinations

Destination of Last Trip	% of Participating Households
Bournemouth	33.9
Christchurch	4.5
East Dorset	16.4
Poole	24.2
New Forest	12.4

Source: NEMS Household Survey April 2017

5.27 The study area population in 2017 (672,392) is projected to grow to 701,917 by 2023 and to 749,700 by 2033. Health and fitness facilities within the three authorities attract 54.8% of respondents, which suggests a catchment population of 368,500 in 2017, 384,700 in 2023 and 410,800 in 2033.

5.28 The South West of England region has 676 registered health and fitness suites with 28,501 fitness stations (average of around 40 stations per suite). This existing provision equates to around 5.3 fitness stations per 1,000 people.

5.29 The catchment population (368,500) could support 1,953 fitness stations based on the regional average of 5.3 stations per 1,000 people. This would increase to 2,039 stations by 2023 and 2,177 stations by 2033.

5.30 The Sport England/Active Places data indicates that there are 33 registered health and fitness suites with 1,838 fitness stations, broken down as follows:

1 Bournemouth 24 facilities with 1,468 fitness stations (see Table 5.4);

2 Christchurch 4 facilities with 115 fitness stations (see Table 5.5); and

3 East Dorset 5 facilities with 255 fitness stations (see Table 5.6).

Table 5.4 Bournemouth Borough Health and Fitness Clubs

Name/Location	Type	No. Fitness Stations
Better Gym, Bournemouth	Registered Membership use	200
Bh Live Active, Queens Park	Registered Membership use	161
Blue Water Spa and Leisure Club	Registered Membership use	19
Chine Roman Spa	Registered Membership use	11
Durley Dean Hotel	Registered Membership use	8
Hallmark Health Club, Bournemouth	Registered Membership use	17
Kings Park Athletics Centre	Registered Membership use	14
Leaf Studio, Oak Academy	Sports Club / Community Association	20
Littledown Centre	Pay and Play	140
Majestic Gym Ltd	Registered Membership use	90
Marriott Leisure Club, Highcliffe	Pay and Play	13
Pelhams Park Leisure Centre	Registered Membership use	110
Pure Gym, Bournemouth	Registered Membership use	110
Sir David English Sports Centre	Registered Membership use	55
Spindles Health & Leisure, Royal Bath	Registered Membership use	16
St Peters Catholic School (Upper School)	Sports Club / Community Association	20
Stokewood Leisure Centre	Pay and Play	50
The Club at Meyrick Park	Registered Membership use	53
The Gym, Bournemouth	Registered Membership use	121
Velocity Health & Fitness, Bournemouth	Registered Membership use	124
Waves Health & Leisure Club, Carlton	Registered Membership use	6
Wessex Leisure Club	Registered Membership use	10
West Hants Lawn Tennis Club	Registered Membership use	60
YMCA, Bournemouth (Lifewise)	Registered Membership use	40
Total		**1,468**

Source: Sport England/Active Places Data, 2016

Table 5.5 Christchurch Borough Health and Fitness Clubs

Name/Location	Type	No. Fitness Stations
Chapel Gate	Pay and Play	18
Curves for Women, Christchurch	Registered Membership use	10
Two Riversmeet Leisure Centre	Registered Membership use	63
Urban Health & Fitness	Registered Membership use	24
Total		**115**

Source: Sport England/Active Places Data, 2016

Table 5.6 East Dorset Health and Fitness Clubs

Name/Location	Type	No. Fitness Stations
BH Live Active, Corfe Mullen	Registered Membership use	80
Dudsbury Golf Club, Longham	Registered Membership use	11
Ferndown Leisure Centre	Pay and Play	48
Lifestyle The Hub, Verwood	Pay and Play	50
Queen Elizabeth Leisure Centre, Stour	Pay and Play	66
Total		**255**

Source: Sport England/Active Places Data, 2016

5.31 There appears to be theoretical capacity for 339 additional fitness stations by 2033. There is scope for a 5 to 7 small/medium health and fitness facilities (approximately 50 to 70 stations). Christchurch and East Dorset are there main areas of qualitative deficiency, whilst Bournemouth appears to have a good range and choice of facilities.

Ten Pin Bowling

5.32 The household survey results suggest that just over 18% of households in the study area visit tenpin bowling facilities. The main destinations are set out in Table 5.7.

Table 5.7 Main Tenpin Bowling Destinations

Destination of Last Trip	% of Participating Households
Poole	81.5
Bournemouth	12.3

Source: NEMS Household Survey April 2017

5.33 Oasis Fun (6 lanes) in Bournemouth is the only bowling alley in Bournemouth. Bournemouth attracts just under 10% of bowling trips within the study area. Oasis Fun has 6 lanes. Poole is the main ten pin bowling destination and has two facilities i.e. Bowlplex at Branksome (24 lanes) and Hollywood Bowl at Tower Park (24 lanes).

5.34 The study area population, plus tourists in 2017 (715,392) can in theory support about 60 tenpin bowling lanes, based on the national average of one lane per 12,000 people. This suggests a small under-supply of 6 lanes. By 2033 the study area population, plus tourists (792,700) could support 66 lanes. An under-supply of 12 lanes. There could be scope for a further small ten-pin bowling facilities over the plan period to serve the Christchurch and east side of Bournemouth.

Bingo, Games of Chance and Gambling

5.35 The household survey results suggest that 4.7% of households in the study area visit bingo facilities, which is slightly lower than the national average participation rate (5%). The main destinations are set out in Table 5.8.

Table 5.8 Main Bingo Destinations

Destination of Last Trip	% of Participating Households
Poole	60.5
Bournemouth	29.8
East Dorset	3.9

Source: NEMS Household Survey April 2017

5.36 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL). The adult (over 18) population in the study area (around 551,000 people[1]) would generate about 965,000 admissions, based on the national participation rate (1.75 trips per adult). Around 80% of these trips could be attracted Bournemouth, Christchurch, East Dorset and Poole (around 770,000 trips).

5.37 These 770,000 trips could support 6-7 bingo facilities based on national average figures (113,000 admissions per club). There are three major Gala Bingo facilities in Bournemouth and Poole and the Club Grand Bingo hall in Bournemouth. There is theoretical scope for further bingo facilities in the study area, but the presence of existing facilities may limit operator demand.

Other Leisure, Entertainment and Cultural Uses

5.38 The leisure, entertainment and cultural sector is fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted within town centres e.g. museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities such as trampoline centres, family entertainment centres, escape rooms and virtual golf centres. Given the fragmented nature of this sector it is difficult to quantify the potential demand for these uses over the plan period.

5.39 The study area population is significant (672,000 people projected to increase to nearly 750,000 by 2033), and provides a critical mass to attract a broad range of leisure, entertainment and cultural uses. In particular Bournemouth benefits from a large number of tourist visitors (3.98 million over-night stays and 2.2 million day trips). The development strategy needs to be flexible and have the ability to response to emerging opportunities for new facilities of this kind, particularly in Bournemouth Town Centre.

Services, Restaurants, Bars and Takeaways

5.40 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** including restaurants, cafes (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

5.41 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres,

[1] Based on the proportion of the adult population (18+) being 82%. Source: Dorset Statistics and Census Information (2015)

the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. The key categories for food and beverage offers are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink and snacks and short break in a pleasant environment rather than focusing on eating a main meal; and,
- **Casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

5.42 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly.

Bournemouth

5.43 The current mix of uses in the main centres in Bournemouth Borough is summarised in Table 5.9 below. In general, the main centres within Bournemouth Borough have retained a good level of Class A1 retail use when compared with the national average, with the exception however of Bournemouth Town Centre and Charminster, where the level of Class A1 uses are significantly below the national average. The vacancy rate remains relatively low within most centres, with the exception of Bournemouth Town Centre, Boscombe, Tuckton and Kinson where vacancy rates are higher than the national average.

Table 5.9 Mix of Class A / Food and Beverage Uses in the Main Centres in Bournemouth Borough

Town	Use Class % of Total Class A Units					
	A1	A2	A3	A4	A5	Vacant
Bournemouth	39.4	10.6	20.5	5.4	6.7	17.4
Castlepoint	76.5	7.8	7.8	0	7.8	0
Boscombe	55.8	6.5	10.8	1.9	5.1	19.9
Westbourne	58.7	13.2	15.6	3.0	4.2	5.4
Winton	54.7	14.9	9.5	3	10	8
Boscombe East	59	11.5	6.6	0	4.9	18
Charminster	44.4	9.8	22.9	5.2	9.2	8.5
Holdenhurst Road	62.5	8.8	12.5	2.5	7.5	6.3
Kinson	61.1	5.6	5.6	1.9	11.1	14.8
Moordown	71.2	10.8	6.3	0	5.4	6.3
Southbourne Grove	65	6.9	8.8	1.9	8.1	9.4
Tuckton	54.7	13.2	11.3	0	1.9	18.9
Wallisdown	63.2	5.3	7.9	2.6	18.4	2.6
UK Average	**56.9**	**11.8**	**9.5**	**4.6**	**6.0**	**11.2**

Source: Bournemouth Borough Council Land Use Survey January 2017

5.44 Overall the provision of food and beverage outlets is significant across the Borough. Bournemouth town centre has a particularly high proportion of Class A3 (restaurants/cafés), which reflects its role as a major tourist destination. This sector has been improved significantly by the new BH2 cinema and restaurant complex. Conversely the proportion of Class A1 retail units is significantly below the national average, which is unusual for a centre of its size. Castlepoint has emerged as the dominant comparison goods shopping centre in the Borough. The strategy for Bournemouth town centre will need to ensure that appropriate balance between tourist related facilities and retail facilities for local residents is maintained. This is address in Volume 2 of the study.

5.45 Boscombe, Westbourne, Charminster, Holdenhurst Road and Tuckton also have a higher than average provision of Class A3 uses. Only Boscombe, Boscombe East, Westbourne, Moordown and Tuckton have a lower than average provision of Class A5 uses. Given the competing pressures for retail and non-retail uses, a balance between Class A1 and Class A3 to A5 uses needs to be maintained to ensure centres continue to fulfil their current roles.

Christchurch and East Dorset

5.46 The current mix of uses in the main centres in Christchurch Borough and East Dorset is summarised in Table 5.10 below.

Table 5.10 Mix of Class A / Food and Beverage Uses in the Main Centres in Christchurch Borough and East Dorset

Town	Use Class % of Total Class A Units					
	A1	A2	A3	A4	A5	Vacant
Christchurch	56.1	17.8	12.1	2.3	2.8	8.9
Ferndown	55.4	20.9	6.4	1.8	6.4	9.1
Verwood	59.5	30.9	2.4	0	4.9	2.4
Wimborne Minster	56.9	15.6	9.5	7.5	2.0	8.5
Westmoors	64.1	17.9	2.6	5.1	7.7	2.6
Highcliffe	63.7	14.3	7.6	1.0	4.8	8.6
UK Average	**56.9**	**11.8**	**9.5**	**4.6**	**6.0**	**11.2**

Source: Christchurch and East Dorset Council Land Use Survey August 2017

5.47 The main centres within Christchurch Borough and East Dorset have retained a good level of Class A1 retail use when compared with the national average, and the vacancy rate remains below the national average in all centres.

5.48 Christchurch and Wimborne Minster both have a higher than average provision of Class A3 uses. Wimborne Minster and West Moors both have a higher than average provision of Class A4 uses. Ferndown and West Moors both have a higher than average provision of Class A5 uses. Given the competing pressures for retail and non-retail uses, and the low vacancy rates, a balance between Class A1 and Class A3 to A5 uses needs to be maintained to ensure centres continue to fulfil their current roles.

Food and Beverage Expenditure

5.49 Experian's food and beverage expenditure per capita projections are shown in Table 2 in Appendix 4. The total food and beverage expenditure in the study area is £784.3 million in 2017, see Table 3 in Appendix 4. Taking into account tourism, this increases to £1,011.86 million in 2017.

5.50 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 25% between 2017 and 2033. Taking into account population growth, total food and drink expenditure within the study is expected to increase from £784.3 million (£1,011.86 taking into account tourism) in 2017 to £1,090.07 million in 2033 (£1,379.14 million taking into account tourism).

Food and Beverage Expenditure Patterns

5.51 A summary of food and beverage expenditure patterns is shown in Table 5.11. The results indicate that the retention of food and beverage trips within the study area is similar to comparison good shopping. Households have good access to a number of different destinations and there is a propensity to visit different destinations. Poole, Bournemouth, Christchurch and Wimborne are the main food and beverage destinations in the study area.

Table 5.11 Food and Beverage (selected main destinations named by respondents)

Zone	Main Destinations (% Market Share in Zone)	
	Eating Out	Drinking out
Zone 1 Bournemouth Central	Bournemouth (34.6%) Poole (14.8%) Castlepoint (8.5%) Christchurch (7.8%) Charminster (5.3%) Boscombe (3.6%)	Bournemouth (37.4%) Winton (10.3%) Boscombe (10.2%) Southbourne Grove (8.8%) Charminster (7.4%) Christchurch (5.5%)
Zone 2 Bournemouth West	Bournemouth (30.1%) Poole (15.0%) Westbourne (11.4%) Charminster (6.1%) Kinson (4.1%)	Bournemouth (22.8%) Westbourne (19.4%) Poole (14.6%) Boscombe (6.4%) Wimborne Minster (6.1%) Kinson (5.0%) Winton (4.5%)
Zone 3 E. Bournemouth/W. Christchurch	Christchurch (42.5%) Bournemouth (32.3%) Southbourne Grove (5.1%)	Christchurch (41.4%) Southbourne Grove (22.3%) Bournemouth (13.5%) Tuckton (5.9%)
Zone 4 Christchurch East/Highcliffe	Christchurch (48.4%) Highcliffe (7.7%) Southampton (7.7%) Bournemouth (6.0%)	Christchurch (58.4%) Highcliffe (12.1%) Winton (4.8%)
Zone 5 Ferndown/Verwood	Ringwood (22.8%) Ferndown (13.3%) Verwood (12.4%) Bournemouth (9.2%)	Verwood (25.0%) Ferndown (16.0%) Wimborne Minster (9.3%) Christchurch (8.7%) Bournemouth (7.1%) West Moors (6.7%)
Zone 6 Wimborne	Wimborne Minster (66.2%) Poole (8.8%) Ferndown (3.9%)	Wimborne Minster (64.9%) Bournemouth (9.9%) Corfe Mullen (7.8%) Castlepoint (5.7%) Ferndown (5.1%) Poole (4.5%)

Source: NEMS Household Survey, April 2017

5.52 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2017) penetration rates are shown in Table 4 in Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Bournemouth Borough is £418.12 million in 2017, of which 42% (£177.49 million) comes from tourist visitors.

5.53 Expenditure attracted to facilities in Christchurch is £102.37 million and £127.4 million is attracted to East Dorset.

Future Capacity for Food and Beverage Floorspace

5.54 Available food and beverage expenditure has been projected forward to 2023, 2028 and 2033 in Tables 7 to 9 in Appendix 4, and summarised in Table 10.

Bournemouth

5.55 Available food and beverage expenditure to facilities within Bournemouth Borough is expected to increase from £418.12 million in 2017 to £570.94 million in 2033. For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2017 (i.e. satisfactory levels). Table 10 assumes that the turnover of food and beverage facilities in Bournemouth Borough will increase in real terms in the future. A growth rate of 1% per annum is adopted, and this growth is required to maintain the health and viability of town centres.

5.56 Taking into account the build-up of trade at the BH2 cinema and restaurant complex, in Bournemouth Borough as a whole there is a small food and beverage expenditure surplus of £0.79 million by 2023, increasing to £28.21 million by 2028.

5.57 These expenditure projections have been converted into floorspace projections in Table 11 in Appendix 4, adopting an average sales density of £5,000 per sq.m gross, which is again projected to grow by 1% in the future due to improved turnover efficiency. The 2028 surplus expenditure could support 5,057 sq.m gross. Based on the current distribution of food and beverage turnover, the gross floorspace projections are broken down in Table 5.12.

Table 5.12 Summary of Food and Beverage Floorspace Projections (sq.m gross) - Bournemouth

Location	By 2023	By 2028
Bournemouth town centre	0	1,353
Boscombe	79	220
Castlepoint	79	211
Other Bournemouth	1,854	3,273
Total	**2,012**	**5,057**

Source: Table 11 in Appendix 4

5.58 By 2033 the surplus could increase to £54.95 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term food and beverage expenditure surplus could support 9,373 sq.m gross.

Christchurch

5.59 Available food and beverage expenditure to facilities within Christchurch Borough is expected to increase from £102.37 million in 2017 to £140.01 million in 2033. By 2023 within Christchurch Borough as a whole, there will be a food and beverage expenditure surplus of £4.72 million. By 2028, future expenditure growth generates an expenditure surplus of £12.18 million, which will grow to £19.97 million by 2033.

5.60 These expenditure projections have been converted into floorspace projections in Table 11 in Appendix 4. Surplus expenditure at 2023 could support 889 sq.m gross, increasing to 2,184 sq.m gross in 2028.

5.61 By 2033 the surplus could increase to £19.97 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term food and beverage expenditure surplus could support 3,406 sq.m gross.

East Dorset

5.62 Available food and beverage expenditure to facilities East Dorset is expected to increase from £127.4 million in 2017 to £149.38 million in 2033. By 2023 there will be a food and beverage expenditure surplus of £5.27 million. By 2028, future expenditure growth generates an expenditure surplus of £13.48 million.

5.63 These expenditure projections have been converted into floorspace projections in Table 11 in Appendix 4, adopting an average sales density of £5,000 per sq.m gross. Surplus expenditure at 2023 could support 992 sq.m gross, increasing to 2,416 million in 2028. Based on the current distribution of food and beverage turnover, the gross floorspace projections are broken down in Table 5.13.

Table 5.13 Summary of Food and Beverage Floorspace Projections (sq.m gross) – East Dorset

Location	By 2023	By 2028
East area of East Dorset	326	825
West area of East Dorset	667	1,572
Total	**992**	**2,416**

Source: Table 11 in Appendix 4

5.64 By 2033 the surplus could increase to £22 million, but this very long term projection is uncertain and will need to be monitored and reviewed. The very long term food and beverage expenditure surplus could support 3,753 sq.m gross.

Qualitative Need

Bournemouth

5.65 Bournemouth town centre's Venuescore food/service index is 131 compared with the national average of 100, which reflects the centre role as a major tourist destination and the high proportion of Class A3 uses. Boscombe has an index of 76, Castlepoint an index of 22, Winton an index of 134, Westbourne an index of 229, Southbourne an index of 153 and Holdenhurst Road an index of 32.

5.66 The proportional mix of Class A within the 13 main centres shown in Figure 5.2 below indicates:

1. Bournemouth Town Centre has a significantly higher than average provision of Class A3 café/restaurant uses, when compared with the national average and a higher than average provision of Class A4 pubs/bars and Class A5 takeaways.
2. Castlepoint (including Castle Lane West) has a lower than average provision of Class A3 café/restaurant uses, when compared with the national average. There are no Class A4 pubs/bars uses and the provision of Class A5 takeaways is higher than the national average.
3. Boscombe has a higher than average provision of Class A3 café/restaurant uses, when compared with the national average. There is a lower than average provision of Class A4 pubs/bars uses and Class A5 takeaways when compared with the national average.

4 Westbourne has a higher than average provision of Class A3 café/restaurant uses, when compared with the national average. There is a lower than average provision of Class A4 pubs/bars uses and Class A5 takeaways when compared with the national average.

5 Winton has the same provision of Class A3 café/restaurant uses, when compared with the national average. There is a lower than average provision of Class A4 pubs/bars uses, but a higher than average provision of Class A5 takeaways when compared with the national average.

6 Boscombe East has a lower than average provision of Class A3 café/restaurant uses and Class A5 takeaway uses, when compared with the national average. There are no Class A4 pubs/bars uses.

7 Charminster has a significantly higher than average provision of Class A3 café/restaurant uses, when compared with the national average. It also has a higher than average provision of Class A4 pubs/bars and Class A5 takeaways when compared with the national average.

8 Holdenhurst Road has a higher than average provision of Class A3 café/restaurant uses and Class A5 takeaways, when compared with the national average. There is a lower than average provision of Class A4 pubs/bars uses when compared with the national average.

9 Kinson has a lower than average provision of Class A3 café/restaurant uses and Class A4 pubs/bars uses, when compared with the national average. There is a significantly higher than average provision of Class A5 takeaways when compared with the national average.

10 Moordown has a lower than average provision of Class A3 café/restaurant uses and Class A5 takeaway uses, when compared with the national average. There are no Class A4 pubs/bars uses.

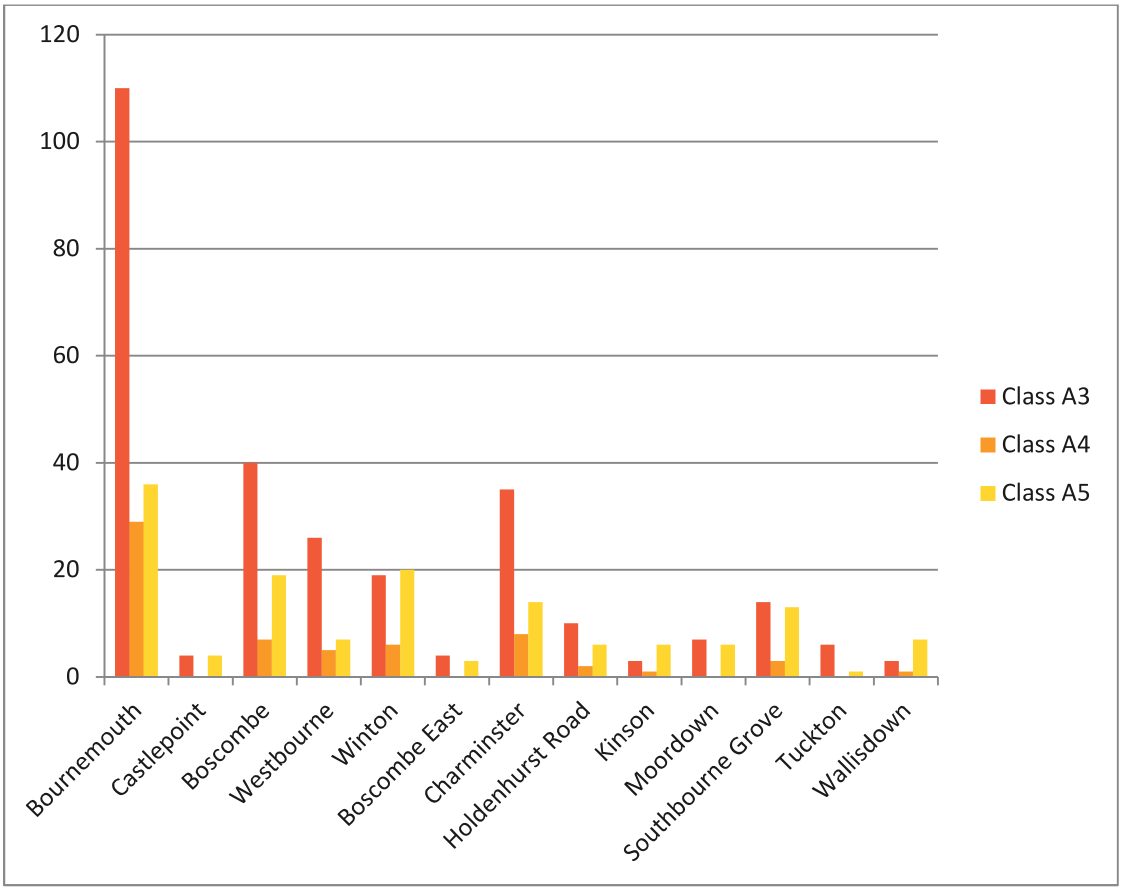
11 Southbourne Grove has a lower than average provision of Class A3 café/restaurant uses and Class A4 pubs/bars uses, when compared with the national average. There is a higher than average provision of Class A5 takeaways when compared with the national average.

12 Tuckton has a higher than average provision of Class A3 café/restaurant uses, when compared with the national average. There is a lower than average provision of Class A5 takeaways when compared with the national average. There are no Class A4 pubs/bars uses.

13 Wallisdown has lower than average provision of Class A3 café/restaurant uses and Class A4 pubs/bars uses, when compared with the national average. There is a significantly above average provision of Class A5 takeaway uses, when compared with the national average.

5.67 There are 485 food and beverage outlets within the 13 main town centres. The town centre audits contained in Volume 2 provide a more accurate analysis of food and beverage provision within the main town centres. The number of food and beverage outlets within each town centre is shown in Figure 5.2 below.

Figure 5.2 Class A3 to A5 Food and Beverage Outlets in Main Centres – Bournemouth



Source: Bournemouth Borough Council Land Use Survey January 2017

Christchurch

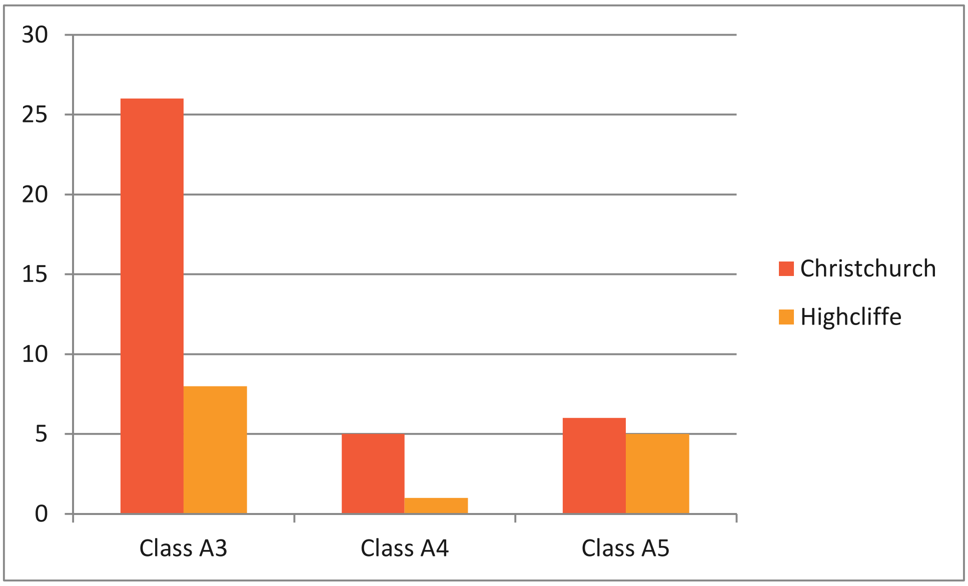
5.68 Christchurch Town Centre's Venuescore food/service index is 91 compared with the national average of 100.

5.69 The proportional mix of Class A within the 2 main centres shown in Figure 5.3 below indicates:

1. Christchurch Town Centre has a higher than average provision of Class A3 café/restaurant uses, when compared with the national average. There is a lower than average provision of Class A4 pubs/bars uses and Class A5 takeaways when compared with the national average.
2. Highcliffe has a lower than average provision of Class A3 café/restaurant uses and Class A5 takeaways, when compared with the national average. There is a significantly lower than average provision of Class A4 pubs/bars uses, when compared with the national average.

5.70 There are 51 food and beverage outlets within the two main town centres. The town centre audits contained in Volume 2 provide a more accurate analysis of food and beverage provision within the main town centres. The number of food and beverage outlets within each town centre is shown in Figure 5.3 below.

Figure 5.3 Class A3 to A5 Food and Beverage Outlets in Christchurch Town Centre and Highcliffe District Centre



Source: Christchurch and East Dorset Council Land Use Survey August 2017

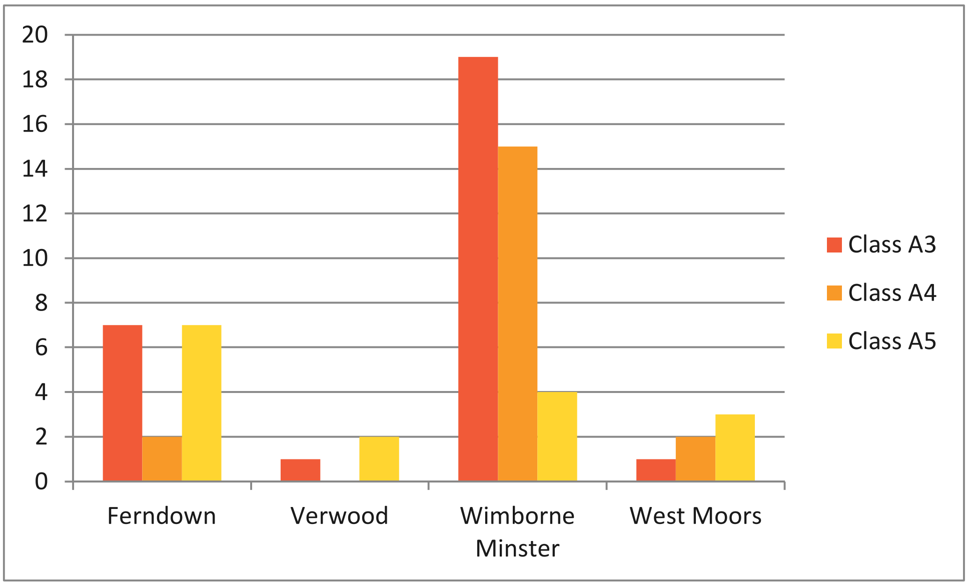
East Dorset

5.71 The proportional mix of Class A within the 4 main centres shown in Figure 5.4 below indicates:

1. Ferndown has a lower than average provision of Class A3 café/restaurant uses and Class A4 pubs/bars uses, when compared with the national average. There is a very slightly higher than average provision of Class A5 takeaways when compared with the national average.
2. Verwood has a lower than average provision of Class A3 café/restaurant uses and Class A5 takeaways, when compared with the national average. There are no Class A4 pubs/bars uses.
3. Wimborne Minster has a higher than average provision of Class A3 café/restaurant uses and Class A4 pubs/bars uses, when compared with the national average. There is a significantly lower than average provision of Class A5 takeaways when compared with the national average.
4. West Moors has a significantly lower than average provision of Class A3 café/restaurant uses when compared with the national average. There is a higher than average provision of Class A4 pubs/bars uses and Class A5 takeaways when compared with the national average.

5.72 There are 63 food and beverage outlets within the four main town centres. The town centre audits contained in Volume 2 provide a more accurate analysis of food and beverage provision within the main town centres. The number of food and beverage outlets within the main town centres is shown in Figure 5.4 below.

Figure 5.4 Class A3 to A5 Food and Beverage Outlets in the Main Centres – East Dorset



Source: Christchurch and East Dorset Council Land Use Survey August 2017

Conclusions

5.73 A summary of the key findings in this Section is set out below.

1 There is theoretical capacity for a further cinema (at least 1,600 seats). Based on current market shares this would be located in Bournemouth. However the presence of two large multiplex cinemas (Cineworld in Poole and the Odeon in Bournemouth) may limit operator demand for an additional facility particularly in the short term.

2 There is theoretical capacity for 5 to 7 small/medium health and fitness facilities (approximately 50 to 70 stations each). Christchurch and East Dorset are there main areas of qualitative deficiency

3 There is theoretical scope for a further small ten-pin bowling facilities over the plan period to serve the Christchurch and east side of Bournemouth.

4 In addition to the main leisure and entertainment uses other uses such as museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities could be appropriate over the plan period. The development strategy needs to be flexible and have the ability to respond to emerging opportunities for new facilities of this kind, particularly in Bournemouth Town Centre.

5 There is theoretical scope for further bingo facilities in the study area, but the presence of existing facilities may limit operator demand.

6 Projections indicate capacity for additional food and beverage outlets in all three authorities, as follows:

   i Bournemouth 4,043 sq.m gross by 2028;

   ii Christchurch 2,184 sq.m gross by 2028; and

   iii East Dorset 2,416 sq.m gross by 2028.

7 Horizon year projections for additional food and beverage outlets in all three authorities, as follow: as follows:

   i Bournemouth 8,359 sq.m gross by 2033;

ii	Christchurch	3,406 sq.m gross by 2033; and
iii	East Dorset	3,753 sq.m gross by 2033.

6.0 Conclusions and Recommendations

6.1 This Volume 1 report provides an update of the needs assessment for retail and commercial leisure development in Bournemouth, Christchurch and East Dorset. The principal conclusions of the analysis contained within this study are summarised below.

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.3 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Long term projections must be treated with caution and kept under review, particularly projections between 2028 and 2033. This report provides projections up to 2023 and 2028, with horizon projections up to 2033.

Convenience Goods Development

6.1 The quantitative assessment of the potential capacity for retail floorspace suggests that there is limited scope for new convenience goods development within Bournemouth, but more potential in Christchurch and East Dorset. The convenience goods projections suggest new floorspace could be distributed as shown in Table 6.1.

Table 6.1 Convenience Goods Floorspace Projections (Sq.M Gross)

	Additional Floorspace SQ.M Gross		
	2017 -2023	**2023 - 2028**	**2017-2028 Total**
Bournemouth	0	0	**0**
Christchurch	0	247	**247**
East Dorset (east)	0	0	**0**
East Dorset (west)	1,366	194	**1,560**
TOTAL	**1,366**	**441**	**1,807**

Source: Table 12 in Appendix 2.

6.3 The horizon projections at 2033 are:

- Bournemouth 1,084 sq.m gross;
- Christchurch 967 sq.m gross;
- East Dorset (east) 491 sq.m gross; and
- East Dorset (west) 1,760 sq.m gross.

6.4 In qualitative terms, food store and convenience retail provision is strong across the study area. There are no obvious areas of qualitative deficiency in food store provision. The floorspace projections in Table 6.1 do not take into account the proposed Asda store at Bailey Drive. If this food store is implemented then the floorspace projections would reduce significantly, and would also have an impact on the floorspace projections for Bournemouth Borough and East Dorset District, as well as Christchurch Borough.

Comparison Goods Development

6.5 The comparison goods projections suggest new floorspace could be distributed as shown in Table 6.2. Comparison goods retail provision is strong in the study area, particularly in Bournemouth town centre, Castlepoint and Poole. Residents have a good choice of higher order comparison shopping destinations and retail warehouse parks, providing a wide range of goods.

Table 6.2 Comparison Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2023	2023 - 2028	2017-2028 Total
Bournemouth	11,752	19,609	**31,361**
Christchurch	1,603	3,889	**5,492**
East Dorset (east)	0	1,255	**1,255**
East Dorset (west)	364	1,151	**1,515**
TOTAL	**13,719**	**25,904**	**39,623**

Source: Tables 10 in Appendix 3.

6.7 The projections in Table 6.2 assume that new development will retain the three authorities' share of comparison expenditure in the study area and will help to maintain this share in the future.

6.8 The horizon projections at 2033 are:

- Bournemouth 51,824 sq.m gross;
- Christchurch 9,596 sq.m gross;
- East Dorset (east) 2,717 sq.m gross; and
- East Dorset (west) 2,735 sq.m gross.

Food and Beverage

6.9 The food and beverage projections suggest new floorspace could be distributed as shown in Table 6.3. Designated centres in the study area generally have a good provision of food and beverage outlets. Growth in expenditure should provide opportunities to improve food and beverage provision within all towns.

Table 6.3 Food and Beverage Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2023	2023 – 2028	Total
Bournemouth	998	3,045	**4,043**
Christchurch	889	1,295	**2,184**
East Dorset (east)	326	499	**825**
East Dorset (west)	667	925	**1,592**
TOTAL	**2,879**	**5,764**	**8,643**

Source: Table 11 in Appendix 4.

6.11 The horizon projections at 2033 are:

- Bournemouth 8,359 sq.m gross;
- Christchurch 3,406 sq.m gross;
- East Dorset (east) 1,300 sq.m gross; and
- East Dorset (west) 2,452 sq.m gross.

Other Town Centre Uses

6.12 The study area has a good range of commercial leisure, entertainment and culture facilities, focused primarily in Bournemouth. Residents also have access to facilities in Poole. The key sectors are present e.g. cinemas, gyms, theatres, bingo and ten pin bowling.

6.13 A summary of the key conclusions are set out below.

- There is theoretical capacity for a further cinema (at least 1,600 seats). Based on current market shares this would be located in Bournemouth. However the presence of two large multiplex cinemas (Cineworld in Poole and the Odeon in Bournemouth) may limit operator demand for an additional facility particularly in the short term.
- There is theoretical capacity for 5 to 7 small/medium health and fitness facilities (approximately 50 to 70 stations each). Christchurch and East Dorset are there main areas of qualitative deficiency.
- There is theoretical scope for a further small ten-pin bowling facilities over the plan period to serve the Christchurch and east side of Bournemouth.
- There is theoretical scope for further bingo facilities in the study area, but the presence of existing facilities may limit operator demand.
- In addition to the main leisure and entertainment uses other uses such as museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities could be appropriate over the plan period. The development strategy needs to be flexible and have the ability to response to emerging opportunities for new facilities of this kind, particularly in Bournemouth town centre.

Future Monitoring

6.14 The recommendations and projections within this study are expected to assist the Councils in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the medium to long term up to 2028. Very long term horizon year projections up to 2033 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. Longer-term projections after 2028 should be treated with caution and provide broad guidance only.

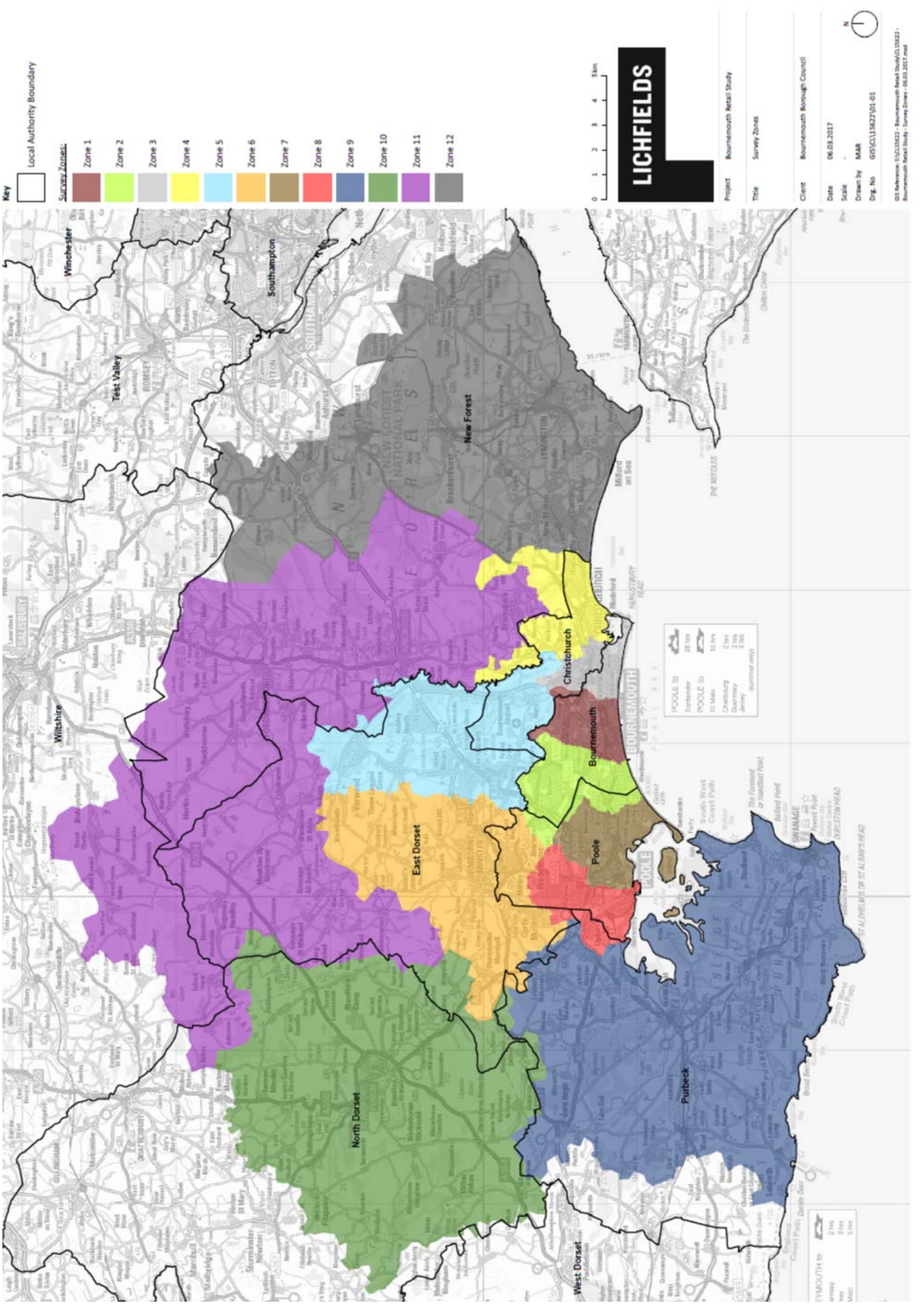
6.15 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

1. population projections;
2. local expenditure estimates (information from Experian or other recognised data providers);
3. growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
4. the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
5. existing retail floorspace and average turnover to floorspace densities; and
6. implemented development within and around the study area.

6.16 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1: Study Area

Zone	Postcode Sector
1	BH1 1, BH1 2, BH1 3, BH1 4, BH5 1, BH5 2, BH7 6, BH7 7, BH8 0, BH8 8, BH8 9
2	BH2 5, BH2 6, BH3 7, BH4 8, BH4 9, BH9 1, BH9 2, BH9 3, BH10 4, BH10 5, BH10 6, BH10 7, BH11 8, BH11 9, BH12 1, BH12 5, BH13 6
3	BH6 3, BH6 4, BH6 5, BH23 1, BH23 2
4	BH23 3, BH23 4, BH23 5, BH23 7
5	BH21 6, BH22 0, BH22 8, BH22 9, BH23 6, BH24 2, BH31 6, BH31 7
6	BH21 1, BH21 2, BH21 3, BH21 4, BH21 7, BH21 8
7	BH12 2, BH12 3, BH12 4, BH13 7, BH14 0, BH14 8, BH14 9, BH15 1, BH15 2, BH15 3, BH17 8
8	BH15 4, BH16 5, BH17 0, BH17 7, BH17 9, BH18 8, BH18 9
9	BH16 6, BH19 1, BH19 2, BH19 3, BH20 4, BH20 5, BH20 6, BH20 7
10	DT11 0, DT11 7, DT11 8, DT11 9
11	BH21 5, BH23 8, BH24 1, BH24 3, BH24 4, SP5 5, SP6 1, SP6 2, SP6 3
12	BH25 5, BH25 6, BH25 7, SO41 0, SO41 3, SO41 5, SO41 6, SO41 8, SO41 9, SO42 7, SO43 7


Key
Local Authority Boundary
Survey Zones:
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Zone 10
Zone 11
Zone 12
LICHFIELDS
Project Bournemouth Retail Study
Title Survey Zones
Client Bournemouth Borough Council
Date 06.03.2017
Drawn by MAR
Winchester
Southampton
Test Valley
New Forest
Wiltshire
East Dorset
Christchurch
Bournemouth
Poole
North Dorset
Purbeck
West Dorset

Appendix 2: Convenience Assessment

Table 1 - Study Area Population

Zone	2011	2017	2023	2028	2033
Zone 1 - Bournemouth Central	70,674	76,952	81,381	85,232	88,506
Zone 2 - Bournemouth West	109,195	117,783	124,220	129,750	134,506
Zone 3 - E. Bournemouth/W. Christchurch	40,110	43,055	45,471	47,556	49,411
Zone 4 - Christchurch East/Highclffe	30,464	31,873	33,491	34,866	36,173
Zone 5 - Ferndown/Verwood	49,235	50,566	52,472	54,172	55,761
Zone 6 - Wimborne	36,515	37,462	38,822	40,017	41,126
Zone 7 - Poole East	83,319	86,480	90,149	93,085	95,794
Zone 8 - Poole West	47,175	48,968	50,864	52,406	53,825
Zone 9 - Purbeck	36,096	37,478	38,372	39,185	39,917
Zone 10 - North Dorset	30,102	31,231	31,993	32,686	33,310
Zone 11 - Ringwood/Fordingbridge	40,840	42,014	43,551	44,859	46,056
Zone 12 - New Forest	66,531	68,529	71,130	73,316	75,314
Total	**640,256**	**672,392**	**701,917**	**727,131**	**749,700**
Tourism (Staying/Day Trips)	n/a	43,000	43,000	43,000	43,000

Sources: *Experian 2011 Census of Population*
Office of National Statistics 2014 SNPP projections
Tourism in Dorset February 2016 (overnight and day visitors)

Table 2 - Convenience Goods Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	2,024	1,985	1,983	1,987
Zone 2 - Bournemouth West	2,058	2,019	2,016	2,020
Zone 3 - E. Bournemouth/W. Christchurch	2,057	2,018	2,015	2,019
Zone 4 - Christchurch East/Highclffe	2,205	2,162	2,159	2,163
Zone 5 - Ferndown/Verwood	2,243	2,200	2,197	2,201
Zone 6 - Wimborne	2,236	2,193	2,190	2,194
Zone 7 - Poole East	2,049	2,010	2,007	2,011
Zone 8 - Poole West	2,094	2,054	2,051	2,055
Zone 9 - Purbeck	2,269	2,226	2,223	2,227
Zone 10 - North Dorset	2,153	2,111	2,109	2,113
Zone 11 - Ringwood/Fordingbridge	2,415	2,369	2,365	2,370
Zone 12 - New Forest	2,415	2,368	2,365	2,370
Tourism	986	977	981	986

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates:-0% 2015-2016,-0.2% 2016-2017, -0.9% 2017 to 2018, 0% p.a. from 2019 to 2023 and 0.1% from 2024
Excludes Special Forms of Trading
Tourism in Dorset February 2016 - average shopping spend = £9 per day of which 30% assumed for convenience goods

Table 3 - Total Convenience Goods Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	155.78	161.58	169.01	175.82
Zone 2 - Bournemouth West	242.44	250.77	261.60	271.69
Zone 3 - E. Bournemouth/W. Christchurch	88.58	91.75	95.83	99.76
Zone 4 - Christchurch East/Highclffe	70.27	72.41	75.29	78.26
Zone 5 - Ferndown/Verwood	113.42	115.43	119.02	122.73
Zone 6 - Wimborne	83.75	85.13	87.63	90.23
Zone 7 - Poole East	177.19	181.16	186.82	192.61
Zone 8 - Poole West	102.54	104.46	107.49	110.60
Zone 9 - Purbeck	85.05	85.40	87.10	88.89
Zone 10 - North Dorset	67.24	67.55	68.93	70.37
Zone 11 - Ringwood/Fordingbridge	101.46	103.15	106.11	109.15
Zone 12 - New Forest	103.84	168.46	173.41	178.47
Study Area Total	**1,391.56**	**1,487.25**	**1,538.24**	**1,588.56**
Tourism	42.40	42.02	42.18	42.40
Study Area Total	**1,433.95**	**1,529.26**	**1,580.42**	**1,630.96**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Convenience Goods Market Shares By Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	7.6%	5.6%	1.5%	0.0%	0.0%	0.0%	0.3%	0.5%	1.9%	1.3%	0.6%	0.2%	65.0%
Boscombe	13.8%	1.5%	4.8%	0.0%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Castlepoint	35.6%	9.5%	13.9%	3.1%	1.6%	0.6%	2.2%	0.5%	0.0%	0.4%	5.4%	1.6%	0.0%
Charminster	3.8%	0.3%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holdenhurst	7.3%	3.5%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kinson	0.0%	9.9%	0.0%	0.0%	1.4%	0.9%	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	0.9%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%
Wallisdown	0.6%	6.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Westbourne	1.9%	2.9%	0.0%	0.0%	0.0%	0.0%	0.7%	1.5%	0.0%	0.0%	0.0%	0.0%	8.0%
Winton	6.6%	11.2%	0.8%	0.0%	0.8%	0.5%	0.4%	0.2%	1.1%	1.0%	0.8%	0.0%	0.0%
Other Bournemouth	13.9%	6.5%	22.7%	2.2%	0.8%	0.0%	2.3%	0.6%	0.0%	0.0%	8.1%	0.0%	0.0%
Bournemouth Sub Total	**92.0%**	**57.7%**	**50.8%**	**5.8%**	**4.7%**	**2.0%**	**6.7%**	**3.8%**	**3.0%**	**2.7%**	**14.9%**	**1.8%**	**79.0%**
Christchurch													
Christchurch town centre	0.9%	0.8%	17.3%	13.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.4%	8.0%
Highcliffe	0.6%	0.2%	1.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	2.3%	1.0%
Other Christhurch	3.7%	0.0%	29.4%	70.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	8.2%	0.0%
Christchurch Sub Total	**5.2%**	**1.0%**	**47.7%**	**88.0%**	**0.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.4%**	**10.9%**	**9.0%**
East Dorset													
Ferndown	0.4%	2.4%	0.0%	1.0%	42.1%	16.0%	0.0%	0.5%	0.4%	0.2%	5.0%	0.0%	0.0%
Verwood	0.4%	1.1%	0.0%	0.2%	30.9%	2.5%	0.9%	0.0%	0.0%	0.0%	9.6%	0.0%	2.0%
Wimborne	0.0%	0.7%	0.0%	0.0%	1.0%	36.4%	0.5%	5.9%	1.7%	2.3%	0.6%	0.0%	10.0%
West Moors	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.2%	5.0%	0.0%	2.8%	0.0%	0.3%	0.0%	0.0%	0.0%
West Parley	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
East Dorset Sub Total	**0.8%**	**4.2%**	**0.0%**	**1.2%**	**76.2%**	**59.9%**	**1.4%**	**9.2%**	**2.1%**	**2.8%**	**15.2%**	**0.0%**	**12.0%**
Other													
New Forest District	0.0%	0.9%	0.3%	4.5%	14.6%	0.6%	0.0%	0.0%	2.0%	0.0%	52.5%	73.5%	n/a
North Dorset District	0.0%	0.1%	0.0%	0.0%	0.0%	1.7%	0.1%	0.3%	0.0%	81.1%	1.8%	0.0%	n/a
Poole	1.7%	35.5%	1.0%	0.0%	2.3%	31.8%	91.7%	83.9%	31.4%	9.0%	1.7%	1.9%	n/a
Purbeck District	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.2%	51.1%	0.0%	0.0%	0.2%	n/a
Eslewhere	0.3%	0.7%	0.2%	0.5%	0.8%	4.0%	0.1%	2.6%	10.4%	4.4%	6.5%	11.7%	n/a
Other Sub Total	**2.0%**	**37.1%**	**1.5%**	**5.0%**	**18.7%**	**38.1%**	**91.9%**	**87.0%**	**94.9%**	**94.5%**	**62.5%**	**87.3%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey April 2017 (weighted results) and Tourism in Dorset February 2016 inc. Lichfields' Estimates

Table 5 - Base Year 2017 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**155.78**	**242.44**	**88.58**	**70.27**	**113.42**	**83.75**	**177.19**	**102.54**	**85.05**	**67.24**	**101.46**	**103.84**	**42.40**	**1,433.95**
Bournemouth														
Bournemouth town centre	11.84	13.58	1.33	0.00	0.00	0.00	0.53	0.51	1.62	0.87	0.61	0.21	27.56	58.65
Boscombe	21.50	3.64	4.25	0.00	0.11	0.00	1.06	0.00	0.00	0.00	0.00	0.00	0.00	30.56
Castlepoint	55.46	23.03	12.31	2.18	1.81	0.50	3.90	0.51	0.00	0.27	5.48	1.66	0.00	107.12
Charminster	5.92	0.73	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.00
Holdenhurst	11.37	8.49	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.92
Kinson	0.00	24.00	0.00	0.00	1.59	0.75	0.35	0.51	0.00	0.00	0.00	0.00	0.00	27.21
Southbourne	1.40	0.00	3.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.54	7.93
Wallisdown	0.93	16.49	1.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.66
Westbourne	2.96	7.03	0.00	0.00	0.00	0.00	1.24	1.54	0.00	0.00	0.00	0.00	3.39	16.16
Winton	10.28	27.15	0.71	0.00	0.91	0.42	0.71	0.21	0.94	0.67	0.81	0.00	0.00	42.80
Other Bournemouth	21.65	15.76	20.11	1.55	0.91	0.00	4.08	0.62	0.00	0.00	8.22	0.00	0.00	72.88
Bournemouth Sub Total	**143.32**	**139.89**	**45.00**	**4.08**	**5.33**	**1.68**	**11.87**	**3.90**	**2.55**	**1.82**	**15.12**	**1.87**	**33.49**	**409.90**
Christchurch														
Christchurch town centre	1.40	1.94	15.32	9.56	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.42	3.39	33.55
Highcliffe	0.93	0.48	0.89	2.60	0.00	0.00	0.00	0.00	0.00	0.00	0.41	2.39	0.42	8.12
Other Christhurch	5.76	0.00	26.04	49.68	0.45	0.00	0.00	0.00	0.00	0.00	5.58	8.51	0.00	96.03
Christchurch Sub Total	**8.10**	**2.42**	**42.25**	**61.83**	**0.45**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**7.51**	**11.32**	**3.82**	**137.71**
East Dorset														
Ferndown	0.62	5.82	0.00	0.70	47.75	13.40	0.00	0.51	0.34	0.13	5.07	0.00	0.00	74.36
Verwood	0.62	2.67	0.00	0.14	35.05	2.09	1.59	0.00	0.00	0.00	9.74	0.00	0.85	52.75
Wimborne	0.00	1.70	0.00	0.00	1.13	30.49	0.89	6.05	1.45	1.55	0.61	0.00	4.24	48.09
West Moors	0.00	0.00	0.00	0.00	1.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.36
Corfe Mullen	0.00	0.00	0.00	0.00	0.23	4.19	0.00	2.87	0.00	0.20	0.00	0.00	0.00	7.49
West Parley	0.00	0.00	0.00	0.00	0.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91
East Dorset Sub Total	**1.25**	**10.18**	**0.00**	**0.84**	**86.43**	**50.17**	**2.48**	**9.43**	**1.79**	**1.88**	**15.42**	**0.00**	**5.09**	**184.96**
Other														
New Forest District	0.00	2.12	0.27	3.16	16.56	0.50	0.00	0.00	1.70	0.00	53.27	76.32	n/a	153.90
North Dorset District	0.00	0.25	0.00	0.00	0.00	1.42	0.18	0.31	0.00	54.53	1.83	0.00	n/a	58.52
Poole	2.65	85.99	0.89	0.00	2.61	26.63	162.49	86.03	26.71	6.05	1.72	1.97	n/a	403.73
Purbeck District	0.00	0.00	0.00	0.00	1.13	0.00	0.00	0.21	43.46	0.00	0.00	0.21	n/a	45.01
Eslewhere	0.47	1.58	0.18	0.35	0.91	3.35	0.18	2.67	8.84	2.96	6.60	12.15	n/a	40.22
Other Sub Total	**3.12**	**89.94**	**1.33**	**3.51**	**21.21**	**31.91**	**162.84**	**89.21**	**80.71**	**63.54**	**63.41**	**90.65**		**701.38**
TOTAL	**155.78**	**242.44**	**88.58**	**70.27**	**113.42**	**83.75**	**177.19**	**102.54**	**85.05**	**67.24**	**101.46**	**103.84**		**1,433.95**

Source: Tables 3 and 4

Table 6 - Future 2023 Convenience Goods Expenditure Patterns By Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**161.58**	**250.77**	**91.75**	**72.41**	**115.43**	**85.13**	**181.16**	**104.46**	**85.40**	**67.55**	**103.15**	**168.46**	**42.02**	**1,529.26**
Bournemouth	148.65	144.69	46.61	4.20	5.43	1.70	12.14	3.97	2.56	1.82	15.37	3.03	33.19	423.37
Christchurch	8.40	2.51	43.77	63.72	0.46	0.00	0.00	0.00	0.00	0.00	7.63	18.36	3.78	148.64
East Dorset - East	1.29	8.78	0.00	0.87	86.57	15.75	1.63	0.52	0.34	0.14	15.06	0.00	0.84	131.79
East Dorset - West	0.00	1.76	0.00	0.00	1.39	35.24	0.91	9.09	1.45	1.76	0.62	0.00	4.20	56.40
Other	3.23	93.03	1.38	3.62	21.59	32.43	166.48	90.88	81.05	63.84	64.47	147.06	n/a	769.06
TOTAL	**161.58**	**250.77**	**91.75**	**72.41**	**115.43**	**85.13**	**181.16**	**104.46**	**85.40**	**67.55**	**103.15**	**168.46**	**42.02**	**1,529.26**

Source: Tables 3 and 4

Table 7 - Future 2028 Convenience Goods Expenditure Patterns by Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**169.01**	**261.60**	**95.83**	**75.29**	**119.02**	**87.63**	**186.82**	**107.49**	**87.10**	**68.93**	**106.11**	**173.41**	**42.18**	**1,580.42**
Bournemouth	155.49	150.94	48.68	4.37	5.59	1.75	12.52	4.08	2.61	1.86	15.81	3.12	33.33	440.16
Christchurch	8.79	2.62	45.71	66.25	0.48	0.00	0.00	0.00	0.00	0.00	7.85	18.90	3.80	154.40
East Dorset - East	1.35	9.16	0.00	0.90	89.26	16.21	1.68	0.54	0.35	0.14	15.49	0.00	0.84	135.93
East Dorset - West	0.00	1.83	0.00	0.00	1.43	36.28	0.93	9.35	1.48	1.79	0.64	0.00	4.22	57.95
Other	3.38	97.05	1.44	3.76	22.26	33.39	171.68	93.51	82.66	65.14	66.32	151.39	n/a	791.98
TOTAL	**169.01**	**261.59**	**95.83**	**75.29**	**119.02**	**87.63**	**186.82**	**107.49**	**87.10**	**68.93**	**106.11**	**173.41**	**42.18**	**1,580.42**

Source: Tables 3 and 4

Table 8 - Future 2033 Convenience Goods Expenditurr Patterns by Zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**175.82**	**271.69**	**99.76**	**78.26**	**122.73**	**90.23**	**192.61**	**110.60**	**88.89**	**70.37**	**109.15**	**178.47**	**42.40**	**1,630.96**
Bournemouth	161.76	156.76	50.68	4.54	5.77	1.80	12.90	4.20	2.67	1.90	16.26	3.21	33.49	455.95
Christchurch	9.14	2.72	47.58	68.86	0.49	0.00	0.00	0.00	0.00	0.00	8.08	19.45	3.82	160.14
East Dorset - East	1.41	9.51	0.00	0.94	92.05	16.69	1.73	0.55	0.36	0.14	15.94	0.00	0.85	140.16
East Dorset - West	0.00	1.90	0.00	0.00	1.47	37.35	0.96	9.62	1.51	1.83	0.65	0.00	4.24	59.55
Other	3.52	100.79	1.50	3.91	22.95	34.38	177.01	96.22	84.36	66.50	68.22	155.80	n/a	815.15
TOTAL	**175.82**	**271.68**	**99.76**	**78.26**	**122.73**	**90.23**	**192.61**	**110.60**	**88.89**	**70.37**	**109.15**	**178.47**	**42.40**	**1,630.96**

Source: Tables 3 and 4

Table 9 - Convenience Goods Floorspace and Benchmark Turnover in Bournemouth

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Bournemouth	Co-operative Food, Madeira Road	322	95%	306	£8,903	£2.72
	Asda Superstore, St Pauls Road	5,465	60%	3,279	£15,213	£49.88
	Lidl, Dalkeith Arcade	735	85%	625	£7,723	£4.82
	M&S Foodhall, Commercial Road	873	95%	829	£10,474	£8.69
	McColls, Commercial Road	55	95%	52	£5,000	£0.26
	McColls, Old Christchurch Road	89	95%	85	£5,000	£0.42
	Tesco Express, The Triangle	301	95%	286	£11,058	£3.16
	Tesco Metro, Bourne Avenue	1,337	90%	1,203	£11,058	£13.31
	Other Bournemouth	1,376	100%	1,376	£5,000	£6.88
	Sub Total	**10,553**		**8,041**		**£90.15**
Boscombe	Aldi, Palmerston Road	941	80%	753	£11,557	£8.70
	Iceland, Christchurch Road	376	95%	357	£8,045	£2.87
	Lidl, Sovereign Shopping Centre, Christchurch Rd	1,199	80%	959	£7,723	£7.41
	Sainsbury's, Christchurch Road	1,840	85%	1,564	£11,690	£18.28
	Other Boscombe	1,765	100%	1,765	£5,000	£8.83
	Sub-Total	**6,121**		**5,399**		**£46.09**
Castlepoint	Asda Superstore, Castle Lane West	5,885	60%	3,531	£15,213	£53.72
	M&S Foodhall, Castle Lane West	1,628	95%	1,547	£10,474	£16.20
	Sainsbury's, Castle Lane West	4,569	70%	3,198	£11,690	£37.39
	Other Castlepoint	85	100%	85	£5,000	£0.43
	Sub-Total	**12,167**		**8,361**		**£107.73**
Charminster	Co-operative Food, Charminster Road	178	95%	169	£8,903	£1.51
	Tesco Express, Charminster Road	216	95%	205	£11,058	£2.27
	Other Charminster	677	100%	677	£5,000	£3.39
	Sub Total	**1,071**		**1,052**		**£7.16**
Holdenhurst Road	Aldi, Stewart Close	969	85%	824	£11,557	£9.52
	Co-operative Food, Holdenhurst Road	318	95%	302	£8,903	£2.69
	Tesco Express, Holdenhurst Road	275	95%	261	£11,058	£2.89
	Sub Total	**1,562**		**1,387**		**£15.10**
Kinson	Tesco Superstore, Wimborne Road, Kinson	2,241	85%	1,905	£11,058	£21.06
	Other Kinson	224	100%	224	£5,000	£1.12
	Sub-Total	**2,465**		**2,129**		**£22.19**
Southbourne	Co-operative Food, Belle Vue Road	322	95%	306	£8,903	£2.72
	Co-operative Food, Seabourne Road	234	95%	222	£8,903	£1.98
	Sainsbury's Local, Southbourne Grove	247	95%	235	£11,690	£2.74
	Tesco Express, Southbourne Grove	272	95%	258	£11,058	£2.86
	Other Southbourne	850	100%	850	£5,000	£4.25
	Sub-Total	**1,925**		**1,871**		**£14.55**
Wallisdown	Aldi, Wallisdown Road	864	85%	734	£11,557	£8.49
	Tesco Express, Wallisdown Road	208	95%	198	£11,058	£2.19
	Sub-Total	**1,072**		**932**		**£10.67**
Westbourne	Co-operative Food, Queens Road	217	95%	206	£8,903	£1.84
	Iceland, Poole Road	419	95%	398	£8,045	£3.20
	M&S Simply Food, Seamoor Road	1,043	95%	991	£10,474	£10.38
	Tesco Express, Poole Road	219	95%	208	£11,058	£2.30
	Other Westbourne	870	100%	870	£5,000	£4.35
	Sub Total	**2,768**		**2,673**		**£22.06**
Winton	Iceland, Wimborne Road	401	95%	381	£8,045	£3.06
	Lidl, Wimborne Road	928	85%	789	£7,723	£6.09
	Sainsbury's Local, Wimborne Road	206	95%	196	£11,690	£2.29
	Tesco Express, 704 Wimborne Road	168	95%	160	£11,058	£1.76
	Waitrose, Wimborne Road	1,597	90%	1,437	£11,665	£16.77
	Other Winton	996	100%	996	£5,000	£4.98
	Sub Total	**4,296**		**3,958**		**£34.95**
Other	Co-operative Food, Columbia Road	159	95%	151	£8,903	£1.34
	Co-operative Food, Castle Lane	217	95%	206	£8,903	£1.84
	Co-operative Food, Christchurch Road	322	95%	306	£8,903	£2.72
	Co-operative Food, Cranleigh Road	92	95%	87	£8,903	£0.78
	Co-operative Food, King John Avenue (Bearwood)	438	95%	416	£8,903	£3.70
	Co-operative Food, Kinson Road	273	95%	259	£8,903	£2.31
	Co-operative Food, Tuckton Road (Tuckton)	167	95%	159	£8,903	£1.41
	Co-operative Food, Wimborne Road (Moordown)	322	95%	306	£8,903	£2.72
	Lidl, Ringwood Road, Bournemouth	757	85%	643	£7,723	£4.97
	McColls, Ringwood Road	84	95%	80	£5,000	£0.40
	Sainsbury's Local, Christchurch Road	157	95%	149	£11,690	£1.74
	Tesco Express, Christchurch Road	212	95%	201	£11,058	£2.23
	Tesco Express, Shillingstone Drive (Muscliffe)	140	95%	133	£11,058	£1.47
	Tesco Express, 1256 Wimborne Road	194	95%	184	£11,058	£2.04
	Tesco Extra, Riverside Avenue	6,263	60%	3,758	£11,058	£41.55
	Other	1,081	100%	1,081	£5,000	£5.40
	Sub Total	**10,878**		**8,120**		**£76.64**
TOTAL		**54,879**		**43,923**		**£447.30**

Source: *Bournemouth Council's Land Use Survey 2016 and ORC StorePoint 2017 and Mintel 2016*

Table 10 - Convenience Goods Floorspace and Benchmark Turnover in East Dorset and Christchurch

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Christchurch Town Centre	Waitrose, Bargates	2,571	90%	2,314	£11,665	£26.99
	Marks & Spencer Simply Food	965	95%	917	£10,474	£9.60
	Other Christchurch Town Centre	900	100%	900	£5,000	£4.50
	Sub-Total	**4,436**		**4,131**		**£41.09**
Highcliffe	Co-op, Lymington Road, Highcliffe	673	85%	572	£8,903	£5.09
	Tesco Express, Lymington Road, Highcliffe	232	95%	220	£11,058	£2.44
	Other Highcliffe	250	100%	250	£5,000	£1.25
	Sub-Total	**1,155**		**1,042**		**£8.78**
Christchurch Other	Sainsbury's, Lynhurst Road	5,643	75%	4,232	£11,690	£49.48
	Aldi, Meteor Retail Park, Somerford Road	982	85%	835	£11,557	£9.65
	Lidl, Somerford Road	940	85%	799	£7,723	£6.17
	Co-op, Fairmile Road	219	95%	208	£8,903	£1.85
	Local shops in Christchurch Borough	2,000	100%	2,000	£5,000	£10.00
	Sub Total	**9,784**		**8,074**		**£77.14**
CBC Total		**15,375**		**13,247**		**£127.02**
Ferndown	Iceland, Victoria Road	454	95%	431	£8,045	£3.47
	McColls, Somerford Road	69	95%	66	£5,000	£0.33
	McColls, Pinehurst Road	84	95%	80	£5,000	£0.40
	Tesco, Pennys Walk	3,293	75%	2,470	£11,058	£27.31
	Tesco Express, Glenmoor Road	133	95%	126	£11,058	£1.40
	Lidl, Ringwood Road	872	85%	741	£7,723	£5.72
	M&S Foodhall, Ringwood Road	943	95%	896	£10,474	£9.38
	Sainsbury's, Ringwood Road	4,101	70%	2,871	£11,690	£33.56
	Other Ferndown	350	100%	350	£5,000	£1.75
	Sub-Total	**10,299**		**8,031**		**£83.32**
Verwood	Co-op, Ringwood Road	322	95%	306	£8,903	£2.72
	Tesco Express, Ringwood Road	254	95%	241	£11,058	£2.67
	Morrisons, Chiltern Drive	3,303	85%	2,808	£10,849	£30.46
	Other Verwood	400	100%	400	£5,000	£2.00
	Sub-Total	**4,279**		**3,755**		**£37.85**
Wimborne	Co-op, Crown Mead	1,168	90%	1,051	£8,903	£9.36
	Co-op, Smugglers Lane	127	95%	121	£8,903	£1.07
	Co-op, Wimborne Road	322	95%	306	£8,903	£2.72
	Co-op, Station Road	322	95%	306	£8,903	£2.72
	McColls, High Street	241	95%	229	£5,000	£1.14
	Waitrose, Rowlands Hill	1,651	90%	1,486	£11,665	£17.33
	Other Wimborne	400	100%	400	£5,000	£2.00
	Sub-Total	**4,231**		**3,899**		**£36.36**
West Moors	Co-op, Station Road	212	95%	201	£8,903	£1.79
	Tesco Express, Station Road	254	95%	241	£11,058	£2.67
	McColls, Turbary Road	86	95%	82	£5,000	£0.41
	Other West Moors	100	100%	100	£5,000	£0.50
	Sub-Total	**652**		**624**		**£5.37**
Corfe Mullen	Co-op, The Parade, Wareham Road	858	90%	772	£8,903	£6.87
	Corfe Mullen Other	100	100%	100	£5,000	£0.50
	Sub Total	**858**		**772**		**£6.87**
West Parley	Tesco Express, New Road	273	95%	259	£11,058	£2.87
	West Parley Other	50	100%	50	£5,000	£0.25
	Sub Total	**273**		**259**		**£2.87**
EDC Total		**20,592**		**17,340**		**£172.64**

Source: *Christchurch & East Dorset Council's Land Use Survey November 2016 and ORC StorePoint 2017 and Mintel 2016*

Table 11 - Summary of Convenience Goods Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth	409.90	423.37	440.16	455.95
Christchurch	137.71	148.64	154.40	160.14
East Dorset (East)	129.38	131.79	135.93	140.16
East Dorset (West)	55.58	56.40	57.95	59.55
Total	**732.57**	**760.20**	**788.44**	**815.80**
Benchmark Turnover of Existing Facilities				
Bournemouth	447.30	447.30	447.30	447.30
Christchurch (1)	127.02	152.43	152.43	152.43
East Dorset - East (2)	129.41	136.25	136.25	136.25
East Dorset - West (3)	43.23	45.51	45.51	45.51
Total	**746.96**	**781.49**	**781.49**	**781.49**
Surplus/Deficit Expenditure £M				
Bournemouth	-37.40	-23.93	-7.14	8.65
Christchurch	10.69	-3.79	1.97	7.72
East Dorset (East)	-0.03	-4.46	-0.32	3.91
East Dorset (West)	12.35	10.89	12.44	14.04
Total	**-14.39**	**-21.29**	**6.95**	**34.31**

Source: Tables 5 to 10

(1) food store commitment at Beagle site added at 2023 - 2,230 sq.m net at £11,394 psm

(2) food store allocation at W.Parley added at 2023 - 600 sq.m net at £11,394 psm

(3) North Wimborne commitment added at 2023 - 200 sq.m net at £11,394 psm

Table 12 - Convenience Goods Floorspace Capacity up to 2033

	2017	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£11,394	£11,394	£11,394	£11,394
Floorspace Projection (sq.m net)				
Bournemouth	0	0	0	759
Christchurch	938	0	173	677
East Dorset (East)	0	0	0	343
East Dorset (West)	1,084	956	1,092	1,232
	2,022	**956**	**1,265**	**3,012**
Floorspace Projection (sq.m gross)				
Bournemouth	0	0	0	1,084
Christchurch	1,340	0	247	967
East Dorset (East)	0	0	0	491
East Dorset (West)	1,548	1,366	1,560	1,760
	2,889	**1,366**	**1,807**	**4,302**

Source: Table 11

Appendix 3: Comparison Assessment

Table 1 - Study Area Population

Zone	2011	2017	2023	2028	2033
Zone 1 - Bournemouth Central	70,674	76,952	81,381	85,232	88,506
Zone 2 - Bournemouth West	109,195	117,783	124,220	129,750	134,506
Zone 3 - E. Bournemouth/W. Christchurch	40,110	43,055	45,471	47,556	49,411
Zone 4 - Christchurch East/Highclffe	30,464	31,873	33,491	34,866	36,173
Zone 5 - Ferndown/Verwood	49,235	50,566	52,472	54,172	55,761
Zone 6 - Wimborne	36,515	37,462	38,822	40,017	41,126
Zone 7 - Poole East	83,319	86,480	90,149	93,085	95,794
Zone 8 - Poole West	47,175	48,968	50,864	52,406	53,825
Zone 9 - Purbeck	36,096	37,478	38,372	39,185	39,917
Zone 10 - North Dorset	30,102	31,231	31,993	32,686	33,310
Zone 11 - Ringwood/Fordingbridge	40,840	42,014	43,551	44,859	46,056
Zone 12 - New Forest	66,531	68,529	71,130	73,316	75,314
Total	**640,256**	**672,392**	**701,917**	**727,131**	**749,700**
Tourism (Staying/Day Trips)	n/a	43,000	43,000	43,000	43,000

Sources:

Experian 2011 Census of Population
Office of National Statistics 2014 SNPP projections
Tourism in Dorset February 2016 (overnight and day visitors)

Table 2 - Comparison Goods Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	2,859	3,266	3,810	4,449
Zone 2 - Bournemouth West	2,900	3,313	3,864	4,512
Zone 3 - E. Bournemouth/W. Christchurch	3,098	3,538	4,127	4,820
Zone 4 - Christchurch East/Highclffe	3,148	3,596	4,195	4,898
Zone 5 - Ferndown/Verwood	3,367	3,846	4,486	5,238
Zone 6 - Wimborne	3,454	3,946	4,603	5,375
Zone 7 - Poole East	3,024	3,454	4,029	4,705
Zone 8 - Poole West	3,059	3,494	4,076	4,760
Zone 9 - Purbeck	3,370	3,850	4,490	5,244
Zone 10 - North Dorset	3,272	3,738	4,360	5,091
Zone 11 - Ringwood/Fordingbridge	3,683	4,207	4,907	5,731
Zone 12 - New Forest	3,607	4,120	4,806	5,612
Tourism	2,300	2,666	3,121	3,654

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates: 3.3% 2015-2016, 1.4% 2016-2017, 1% 2017 to 2018, 3% p.a. from 2019 to 2023 and 3.2% from 2024
Excludes Special Forms of Trading
Tourism in Dorset February 2016 - average shopping spend = £9 per day of which 70% assumed for comparison goods

Table 3 - Total Comparison Goods Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	220.02	265.80	324.70	393.75
Zone 2 - Bournemouth West	341.57	411.52	501.36	606.94
Zone 3 - E. Bournemouth/W. Christchurch	133.36	160.90	196.28	238.15
Zone 4 - Christchurch East/Highclffe	100.34	120.44	146.25	177.19
Zone 5 - Ferndown/Verwood	170.24	201.80	243.00	292.09
Zone 6 - Wimborne	129.41	153.20	184.19	221.06
Zone 7 - Poole East	261.48	311.38	375.02	450.68
Zone 8 - Poole West	149.79	177.74	213.60	256.19
Zone 9 - Purbeck	126.30	147.72	175.95	209.31
Zone 10 - North Dorset	102.19	119.59	142.51	169.60
Zone 11 - Ringwood/Fordingbridge	154.74	183.23	220.14	263.94
Zone 12 - New Forest	247.16	293.06	352.33	422.65
Study Area Total	**2,136.62**	**2,546.37**	**3,075.33**	**3,701.54**
Tourism	98.90	114.65	134.21	157.10
Study Area Total	**2,235.52**	**2,661.02**	**3,209.54**	**3,858.65**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Comparison Goods Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	16.2%	17.6%	13.8%	8.9%	8.6%	10.5%	9.6%	5.0%	9.0%	6.3%	9.5%	4.6%	65.0%
Boscombe	6.0%	2.5%	3.9%	1.3%	0.4%	0.5%	0.3%	0.1%	0.0%	0.2%	1.0%	0.2%	0.0%
Castlepoint	41.5%	22.7%	25.7%	19.1%	38.5%	5.5%	9.3%	9.3%	2.4%	4.7%	14.4%	6.5%	0.0%
Charminster	0.1%	0.1%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kinson	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	0.2%	0.2%	1.7%	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Wallisdown	0.0%	0.5%	0.0%	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%
Westbourne	0.2%	1.2%	0.8%	0.1%	0.1%	0.0%	0.6%	0.1%	0.1%	0.0%	0.0%	0.2%	8.0%
Winton	2.3%	3.8%	0.2%	0.0%	0.5%	0.1%	0.3%	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%
Other Bournemouth	12.7%	8.7%	9.2%	6.9%	4.6%	1.2%	2.0%	2.5%	0.6%	1.6%	5.9%	4.0%	0.0%
Bournemouth Sub Total	**79.2%**	**58.4%**	**55.3%**	**37.0%**	**53.3%**	**17.9%**	**22.3%**	**17.4%**	**12.1%**	**12.8%**	**31.0%**	**15.6%**	**78.0%**
Christchurch													
Christchurch town centre	3.9%	0.8%	20.5%	34.4%	0.3%	0.0%	0.3%	0.7%	0.0%	0.0%	8.9%	5.5%	8.0%
Highcliffe	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.0%
Other Christhurch	1.2%	0.3%	11.3%	13.9%	0.4%	0.0%	0.1%	0.5%	0.0%	0.0%	3.4%	7.8%	0.0%
Christchurch Sub Total	**5.1%**	**1.1%**	**31.8%**	**48.9%**	**0.8%**	**0.0%**	**0.4%**	**1.2%**	**0.0%**	**0.0%**	**12.3%**	**13.4%**	**9.0%**
East Dorset													
Ferndown	0.5%	0.7%	0.7%	0.2%	14.4%	1.2%	0.2%	0.3%	0.1%	0.2%	0.3%	0.2%	0.0%
Verwood	0.0%	0.1%	0.0%	0.2%	4.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	2.0%
Wimborne	0.4%	1.0%	0.4%	0.2%	1.7%	20.8%	0.3%	2.4%	0.8%	2.1%	3.7%	0.0%	10.0%
West Moors	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Parley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other East Dorset	0.5%	2.3%	0.0%	0.2%	1.7%	0.8%	0.9%	0.4%	0.0%	0.0%	1.5%	0.1%	1.0%
East Dorset Sub Total	**1.4%**	**4.1%**	**1.1%**	**0.8%**	**22.6%**	**23.0%**	**1.4%**	**3.1%**	**0.9%**	**2.3%**	**6.0%**	**0.3%**	**13.0%**
Other													
New Forest District	0.4%	0.2%	0.5%	2.7%	4.3%	0.6%	0.7%	0.0%	0.0%	0.0%	21.7%	39.8%	n/a
North Dorset District	0.0%	0.0%	0.2%	0.0%	0.0%	0.5%	0.0%	0.1%	0.2%	37.3%	0.9%	0.0%	n/a
Poole	10.9%	32.5%	6.2%	2.1%	10.9%	51.5%	70.4%	74.6%	58.9%	39.4%	5.8%	2.1%	n/a
Purbeck District	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	15.5%	0.1%	0.0%	0.1%	n/a
Eslewhere	3.0%	3.5%	4.9%	8.5%	8.1%	6.5%	4.8%	3.5%	12.4%	8.1%	22.3%	28.7%	n/a
Other Sub Total	**14.3%**	**36.4%**	**11.8%**	**13.3%**	**23.3%**	**59.1%**	**75.9%**	**78.3%**	**87.0%**	**84.9%**	**50.7%**	**70.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2017 (weighted results)

Table 5 - Base Year 2017 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**220.02**	**341.57**	**133.36**	**100.34**	**170.24**	**129.41**	**261.48**	**149.79**	**126.30**	**102.19**	**154.74**	**247.16**	**98.90**	**2,235.52**
Bournemouth														
Bournemouth town centre	35.64	60.12	18.40	8.93	14.64	13.59	25.10	7.49	11.37	6.44	14.70	11.37	64.29	292.07
Boscombe	13.20	8.54	5.20	1.30	0.68	0.65	0.78	0.15	0.00	0.20	1.55	0.49	0.00	32.75
Castlepoint	91.31	77.54	34.27	19.17	65.54	7.12	24.32	13.93	3.03	4.80	22.28	16.07	0.00	379.37
Charminster	0.22	0.34	0.00	0.40	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.13
Kinson	0.00	3.76	0.00	0.00	0.00	0.00	0.52	0.00	0.00	0.00	0.00	0.00	0.00	4.28
Southbourne	0.44	0.68	2.27	0.20	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.95	9.22
Wallisdown	0.00	1.71	0.00	0.10	0.17	0.13	0.00	0.15	0.00	0.00	0.31	0.00	0.00	2.57
Westbourne	0.44	4.10	1.07	0.10	0.17	0.00	1.57	0.15	0.13	0.00	0.00	0.49	7.91	16.13
Winton	5.06	12.98	0.27	0.00	0.85	0.13	0.78	0.45	0.00	0.00	0.00	0.25	0.00	20.77
Other Bournemouth	27.94	29.72	12.27	6.92	7.83	1.55	5.23	3.74	0.76	1.64	9.13	9.89	0.00	116.62
Bournemouth Sub Total	**174.25**	**199.48**	**73.75**	**37.13**	**90.74**	**23.16**	**58.31**	**26.06**	**15.28**	**13.08**	**47.97**	**38.56**	**77.14**	**874.92**
Christchurch														
Christchurch town centre	8.58	2.73	27.34	34.52	0.51	0.00	0.78	1.05	0.00	0.00	13.77	13.59	7.91	110.79
Highcliffe	0.00	0.00	0.00	0.60	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.99	2.01
Other Christhurch	2.64	1.02	15.07	13.95	0.68	0.00	0.26	0.75	0.00	0.00	5.26	19.28	0.00	58.91
Christchurch Sub Total	**11.22**	**3.76**	**42.41**	**49.07**	**1.36**	**0.00**	**1.05**	**1.80**	**0.00**	**0.00**	**19.03**	**33.12**	**8.90**	**171.71**
East Dorset														
Ferndown	1.10	2.39	0.93	0.20	24.51	1.55	0.52	0.45	0.13	0.20	0.46	0.49	0.00	32.95
Verwood	0.00	0.34	0.00	0.20	7.15	0.13	0.00	0.00	0.00	0.00	0.77	0.00	1.98	10.57
Wimborne	0.88	3.42	0.53	0.20	2.89	26.92	0.78	3.60	1.01	2.15	5.73	0.00	9.89	57.99
West Moors	0.00	0.00	0.00	0.00	1.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Corfe Mullen	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13
West Parley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other East Dorset	1.10	7.86	0.00	0.20	2.89	1.04	2.35	0.60	0.00	0.00	2.32	0.25	0.99	19.60
East Dorset Sub Total	**3.08**	**14.00**	**1.47**	**0.80**	**38.47**	**29.76**	**3.66**	**4.64**	**1.14**	**2.35**	**9.28**	**0.74**	**12.86**	**122.27**
Other														
New Forest District	0.88	0.68	0.67	2.71	7.32	0.78	1.83	0.00	0.00	0.00	33.58	98.37	n/a	146.81
North Dorset District	0.00	0.00	0.27	0.00	0.00	0.65	0.00	0.15	0.25	38.12	1.39	0.00	n/a	40.83
Poole	23.98	111.01	8.27	2.11	18.56	66.65	184.09	111.75	74.39	40.26	8.97	5.19	n/a	655.22
Purbeck District	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.15	19.58	0.10	0.00	0.25	n/a	20.76
Eslewhere	6.60	11.96	6.53	8.53	13.79	8.41	12.55	5.24	15.66	8.28	34.51	70.94	n/a	203.00
Other Sub Total	**31.46**	**124.33**	**15.74**	**13.35**	**39.67**	**76.48**	**198.47**	**117.29**	**109.88**	**86.76**	**78.45**	**174.74**		**1,066.62**
TOTAL	**220.02**	**341.57**	**133.36**	**100.34**	**170.24**	**129.41**	**261.48**	**149.79**	**126.30**	**102.19**	**154.74**	**247.16**		**2,235.52**

Source: Tables 3 and 4

Table 6 - Future 2023 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**265.80**	**411.52**	**160.90**	**120.44**	**201.80**	**153.20**	**311.38**	**177.74**	**147.72**	**119.59**	**183.23**	**293.06**	**114.65**	**2,661.02**
Bournemouth town centre	43.06	72.43	22.20	10.72	17.35	16.09	29.89	8.89	13.29	7.53	17.41	13.48	74.52	346.87
Boscombe	15.95	10.29	6.27	1.57	0.81	0.77	0.93	0.18	0.00	0.24	1.83	0.59	0.00	39.42
Castlepoint	110.31	93.41	41.35	23.00	77.69	8.43	28.96	16.53	3.55	5.62	26.39	19.05	0.00	454.28
Other Bournemouth	41.20	64.20	19.15	9.27	11.70	2.14	9.65	5.33	1.03	1.91	11.18	12.60	14.90	204.28
Bournemouth Sub Total	**210.52**	**240.33**	**88.98**	**44.56**	**107.56**	**27.42**	**69.44**	**30.93**	**17.87**	**15.31**	**56.80**	**45.72**	**89.43**	**1,044.85**
Christchurch	13.56	4.53	51.17	58.90	1.61	0.00	1.25	2.13	0.00	0.00	22.54	39.27	10.32	205.26
East Dorset - East	2.66	12.76	1.13	0.72	42.18	3.22	3.43	1.24	0.15	0.24	4.21	0.88	3.44	76.25
East Dorset - West	1.06	4.12	0.64	0.24	3.43	32.02	0.93	4.27	1.18	2.51	6.78	0.00	11.47	68.65
Other	38.01	149.79	18.99	16.02	47.02	90.54	236.34	139.17	128.52	101.53	92.90	207.19	n/a	1,266.01
TOTAL	**265.80**	**411.52**	**160.90**	**120.44**	**201.80**	**153.20**	**311.38**	**177.74**	**147.72**	**119.59**	**183.23**	**293.06**	**114.65**	**2,661.02**

Source: Tables 3 and 4

Table 7 - 2028 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**324.70**	**501.36**	**196.28**	**146.25**	**243.00**	**184.19**	**375.02**	**213.60**	**175.95**	**142.51**	**220.14**	**352.33**	**134.21**	**3,209.54**
Bournemouth town centre	52.60	88.24	27.09	13.02	20.90	19.34	36.00	10.68	15.84	8.98	20.91	16.21	87.24	417.03
Boscombe	19.48	12.53	7.65	1.90	0.97	0.92	1.13	0.21	0.00	0.29	2.20	0.70	0.00	47.99
Castlepoint	134.75	113.81	50.44	27.93	93.56	10.13	34.88	19.86	4.22	6.70	31.70	22.90	0.00	550.89
Other Bournemouth	50.33	78.21	23.36	11.26	14.09	2.58	11.63	6.41	1.23	2.28	13.43	15.15	17.45	247.40
Bournemouth Sub Total	**257.16**	**292.79**	**108.54**	**54.11**	**129.52**	**32.97**	**83.63**	**37.17**	**21.29**	**18.24**	**68.24**	**54.96**	**104.68**	**1,263.32**
Christchurch	16.56	5.51	62.42	71.52	1.94	0.00	1.50	2.56	0.00	0.00	27.08	47.21	12.08	248.38
East Dorset - East	3.25	15.54	1.37	0.88	50.79	3.87	4.13	1.50	0.18	0.29	5.06	1.06	4.03	91.92
East Dorset - West	1.30	5.01	0.79	0.29	4.13	38.50	1.13	5.13	1.41	2.99	8.15	0.00	13.42	82.24
Other	46.43	182.49	23.16	19.45	56.62	108.86	284.64	167.25	153.08	120.99	111.61	249.10	n/a	1,523.68
TOTAL	**324.70**	**501.36**	**196.28**	**146.25**	**243.00**	**184.19**	**375.02**	**213.60**	**175.95**	**142.51**	**220.14**	**352.33**	**134.21**	**3,209.54**

Source: Tables 3 and 4

Table 8 - 2033 Comparison Goods Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**393.75**	**606.94**	**238.15**	**177.19**	**292.09**	**221.06**	**450.68**	**256.19**	**209.31**	**169.60**	**263.94**	**422.65**	**157.10**	**3,858.65**
Bournemouth town centre	63.79	106.82	32.86	15.77	25.12	23.21	43.27	12.81	18.84	10.68	25.07	19.44	102.12	499.80
Boscombe	23.62	15.17	9.29	2.30	1.17	1.11	1.35	0.26	0.00	0.34	2.64	0.85	0.00	58.10
Castlepoint	163.40	137.78	61.20	33.84	112.46	12.16	41.91	23.83	5.02	7.97	38.01	27.47	0.00	665.05
Other Bournemouth	61.03	94.68	28.34	13.64	16.94	3.09	13.97	7.69	1.47	2.71	16.10	18.17	20.42	298.27
Bournemouth Sub Total	**311.85**	**354.45**	**131.69**	**65.56**	**155.69**	**39.57**	**100.50**	**44.58**	**25.33**	**21.71**	**81.82**	**65.93**	**122.54**	**1,521.22**
Christchurch	20.08	6.68	75.73	86.65	2.34	0.00	1.80	3.07	0.00	0.00	32.46	56.64	14.14	299.59
East Dorset - East	3.94	18.82	1.67	1.06	61.05	4.64	4.96	1.79	0.21	0.34	6.07	1.27	4.71	110.52
East Dorset - West	1.57	6.07	0.95	0.35	4.97	46.20	1.35	6.15	1.67	3.56	9.77	0.00	15.71	98.33
Other	56.31	220.93	28.10	23.57	68.06	130.64	342.07	200.60	182.10	143.99	133.82	298.82	n/a	1,828.99
TOTAL	**393.75**	**606.94**	**238.15**	**177.19**	**292.09**	**221.06**	**450.68**	**256.19**	**209.31**	**169.60**	**263.94**	**422.65**	**157.10**	**3,858.65**

Source: Tables 3 and 4

Table 9 - Summary of Comparison Goods Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth town centre	292.07	346.87	417.03	499.80
Boscombe	32.75	39.42	47.99	58.10
Castlepoint	379.37	454.28	550.89	665.05
Other Bournemouth	170.71	204.28	247.40	298.27
Christchurch	171.71	205.26	248.38	299.59
East Dorset - East	64.14	76.25	91.92	110.52
East Dorset - West	58.12	68.65	82.24	98.33
Total	**1,168.90**	**1,395.01**	**1,685.86**	**2,029.66**
Benchmark Turnover of Existing Facilities				
Bournemouth town centre	292.07	328.92	363.16	400.96
Boscombe	32.75	36.89	40.73	44.96
Castlepoint	379.37	427.24	471.70	520.80
Other Bournemouth	170.71	192.25	212.26	234.35
Christchurch (1)	171.71	197.14	217.65	240.31
East Dorset - East (2)	64.14	76.90	84.90	93.74
East Dorset - West (3)	58.12	66.81	73.76	81.44
Total	**1,168.90**	**1,326.14**	**1,464.16**	**1,616.55**
Surplus Expenditure (£m)				
Bournemouth town centre	0.00	17.95	53.88	98.85
Boscombe	0.00	2.53	7.27	13.13
Castlepoint	0.00	27.05	79.18	144.26
Other Bournemouth	0.00	12.03	35.14	63.91
Christchurch	0.00	8.13	30.73	59.28
East Dorset - East	0.00	-0.65	7.02	16.79
East Dorset - West	0.00	1.84	8.48	16.89
Total	**0.00**	**68.88**	**221.70**	**413.10**

Source: Tables 5 to 8

(1) food store comparison sales at Beagle site added at 2023 - 557 sq.m net at £6,757 psm

(2) Sainsbury's extension at Ferndown added at 2023 - 689 sq.m net at £6,757 psm

(3) North Wimborne commitment added at 2023 - 200 sq.m net at £6,757 psm

Table 10 - Bournemouth Comparison Goods Floorspace Capacity up to 2033

	2017	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,757	£7,460	£8,237
Floorspace Projection (sq.m net)				
Bournemouth town centre	0	2,656	7,222	12,001
Boscombe	0	375	974	1,594
Castlepoint	0	4,003	10,614	17,514
Other Bournemouth	0	1,780	4,711	7,760
Sub-Total	**0**	**8,814**	**23,521**	**38,868**
Christchurch	**0**	**1,203**	**4,119**	**7,197**
East Dorset - East	0	0	941	2,038
East Dorset - West	0	273	1,136	2,051
Sub-Total	**0**	**273**	**2,078**	**4,089**
Total	**0**	**10,290**	**29,717**	**50,154**
Floorspace Projection (sq.m gross)				
Bournemouth town centre	0	3,541	9,629	16,001
Boscombe	0	500	1,299	2,126
Castlepoint	0	5,337	14,152	23,352
Other Bournemouth	0	2,374	6,281	10,346
Sub-Total	**0**	**11,752**	**31,361**	**51,824**
Christchurch	**0**	**1,603**	**5,492**	**9,596**
East Dorset - East	0	0	1,255	2,717
East Dorset - West	0	364	1,515	2,735
Sub-Total	**0**	**364**	**2,770**	**5,452**
Total	**0**	**13,719**	**39,623**	**66,872**

Source: Table 9

Appendix 4: Food/Beverage Assessment

Table 1 - Study Area Population

Zone	2011	2017	2023	2028	2033
Zone 1 - Bournemouth Central	70,674	76,952	81,381	85,232	88,506
Zone 2 - Bournemouth West	109,195	117,783	124,220	129,750	134,506
Zone 3 - E. Bournemouth/W. Christchurch	40,110	43,055	45,471	47,556	49,411
Zone 4 - Christchurch East/Highclffe	30,464	31,873	33,491	34,866	36,173
Zone 5 - Ferndown/Verwood	49,235	50,566	52,472	54,172	55,761
Zone 6 - Wimborne	36,515	37,462	38,822	40,017	41,126
Zone 7 - Poole East	83,319	86,480	90,149	93,085	95,794
Zone 8 - Poole West	47,175	48,968	50,864	52,406	53,825
Zone 9 - Purbeck	36,096	37,478	38,372	39,185	39,917
Zone 10 - North Dorset	30,102	31,231	31,993	32,686	33,310
Zone 11 - Ringwood/Fordingbridge	40,840	42,014	43,551	44,859	46,056
Zone 12 - New Forest	66,531	68,529	71,130	73,316	75,314
Total	**640,256**	**672,392**	**701,917**	**727,131**	**749,700**
Tourism (Staying/Day Trips)	n/a	43,000	43,000	43,000	43,000

Sources:
Experian 2011 Census of Population
Office of National Statistics 2014 SNPP projections
Tourism in Dorset February 2016

Table 2 - Food and Beverage Expenditure per person per annum (£)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	1,205	1,295	1,395	1,503
Zone 2 - Bournemouth West	1,171	1,258	1,355	1,460
Zone 3 - E. Bournemouth/W. Christchurch	1,104	1,186	1,277	1,376
Zone 4 - Christchurch East/Highclffe	1,083	1,163	1,253	1,350
Zone 5 - Ferndown/Verwood	1,159	1,245	1,341	1,445
Zone 6 - Wimborne	1,213	1,303	1,404	1,512
Zone 7 - Poole East	1,118	1,201	1,294	1,394
Zone 8 - Poole West	1,079	1,159	1,249	1,345
Zone 9 - Purbeck	1,163	1,249	1,346	1,450
Zone 10 - North Dorset	1,134	1,218	1,312	1,414
Zone 11 - Ringwood/Fordingbridge	1,280	1,375	1,481	1,596
Zone 12 - New Forest	1,244	1,336	1,439	1,550
Tourism	5,292	5,718	6,240	6,722

Sources:
Experian Local Expenditure 2015 (2015 prices)
Growth Rates: 1.9% 2015-2016, 0.5% 2016-2017, 0.2% 2017 to 2018, 1.3% p.a. from 2019 to 2023 and 1.5% from 2024
Tourism in Dorset February 2016 - average shopping spend = £14.50 per day

Table 3 - Total Food and Beverage Expenditure (£m)

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	92.75	105.37	118.88	132.99
Zone 2 - Bournemouth West	137.92	156.25	175.82	196.35
Zone 3 - E. Bournemouth/W. Christchurch	47.52	53.91	60.74	67.98
Zone 4 - Christchurch East/Highclffe	34.51	38.96	43.69	48.83
Zone 5 - Ferndown/Verwood	58.59	65.31	72.64	80.55
Zone 6 - Wimborne	45.44	50.58	56.17	62.18
Zone 7 - Poole East	96.72	108.30	120.47	133.56
Zone 8 - Poole West	52.85	58.97	65.45	72.42
Zone 9 - Purbeck	43.58	47.93	52.73	57.87
Zone 10 - North Dorset	35.41	38.97	42.89	47.08
Zone 11 - Ringwood/Fordingbridge	53.78	59.88	66.44	73.49
Zone 12 - New Forest	85.23	95.02	105.51	116.77
Study Area Total	**784.30**	**879.45**	**981.43**	**1,090.07**
Tourism	227.56	245.88	268.33	289.07
Study Area Total	**1,011.86**	**1,125.33**	**1,249.76**	**1,379.14**

Source: Tables 1 and 2

Table 4 - Base Year 2017 Food and Beverage Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth													
Bournemouth town centre	36.8%	30.3%	30.0%	5.2%	9.4%	3.2%	24.1%	4.8%	11.9%	1.0%	7.6%	7.8%	64.0%
Boscombe	5.2%	2.6%	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Castlepoint	7.4%	0.4%	0.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Charminster	6.0%	5.6%	0.9%	0.7%	1.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Kinson	0.2%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southbourne	4.3%	0.2%	8.8%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Wallisdown	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Westbourne	1.6%	13.7%	0.9%	0.0%	0.8%	1.8%	7.8%	0.0%	1.2%	0.0%	0.0%	0.0%	10.0%
Winton	2.7%	5.1%	0.3%	2.0%	1.6%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Other Bournemouth	1.3%	0.3%	3.0%	0.0%	0.2%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%	1.0%
Bournemouth Sub Total	**65.5%**	**66.3%**	**44.8%**	**8.5%**	**14.6%**	**5.0%**	**33.6%**	**5.2%**	**14.0%**	**2.3%**	**8.5%**	**7.8%**	**78.0%**
Christchurch													
Christchurch town centre	7.6%	2.4%	44.3%	52.1%	4.8%	0.3%	1.0%	0.0%	0.0%	0.0%	15.0%	10.9%	8.0%
Highcliffe	0.0%	0.4%	1.2%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Other Christhurch	0.7%	0.0%	2.4%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.0%	1.0%
Christchurch Sub Total	**8.3%**	**2.8%**	**47.9%**	**66.3%**	**4.8%**	**0.3%**	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**15.8%**	**14.4%**	**9.0%**
East Dorset													
Ferndown	0.5%	2.8%	0.3%	0.0%	14.8%	4.3%	0.2%	0.3%	0.0%	0.3%	1.3%	0.0%	0.0%
Verwood	0.0%	0.4%	0.0%	0.0%	15.9%	0.6%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	2.0%
Wimborne	0.2%	3.7%	0.0%	0.0%	9.4%	67.3%	2.5%	16.4%	1.9%	7.4%	3.1%	0.0%	10.0%
West Moors	0.0%	0.7%	0.0%	0.0%	2.9%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Corfe Mullen	0.0%	0.1%	0.0%	0.0%	0.3%	2.2%	0.0%	1.5%	0.0%	8.5%	0.0%	0.0%	0.0%
West Parley	0.8%	0.4%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other East Dorset	0.2%	0.4%	0.0%	0.0%	2.8%	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
East Dorset Sub Total	**1.7%**	**8.5%**	**0.3%**	**0.0%**	**46.4%**	**74.6%**	**3.3%**	**19.2%**	**1.9%**	**16.2%**	**6.3%**	**0.0%**	**13.0%**
Other													
New Forest District	3.8%	1.0%	2.2%	6.5%	23.2%	6.2%	0.5%	0.0%	0.0%	1.0%	49.7%	42.7%	n/a
North Dorset District	0.0%	1.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.8%	43.4%	1.6%	0.0%	n/a
Poole	15.0%	17.4%	0.0%	1.1%	2.4%	9.8%	55.6%	69.0%	17.3%	9.5%	1.9%	4.1%	n/a
Purbeck District	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.3%	22.6%	1.3%	0.0%	0.0%	n/a
Eslewhere	4.8%	2.9%	4.8%	17.6%	8.6%	3.8%	5.3%	5.3%	43.4%	26.3%	16.2%	31.0%	n/a
Other Sub Total	**24.5%**	**22.4%**	**7.0%**	**25.2%**	**34.2%**	**20.1%**	**62.1%**	**75.6%**	**84.1%**	**81.5%**	**69.4%**	**77.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2017 (weighted results) and Tourism in Dorset February 2016 inc. Lichfields' Estimates

Table 5 - Base Year 2017 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2017	**92.75**	**137.92**	**47.52**	**34.51**	**58.59**	**45.44**	**96.72**	**52.85**	**43.58**	**35.41**	**53.78**	**85.23**	**227.56**	**1,011.86**
Bournemouth														
Bournemouth town centre	34.13	41.79	14.26	1.79	5.51	1.45	23.31	2.54	5.19	0.35	4.09	6.65	145.64	286.69
Boscombe	4.82	3.59	0.00	0.21	0.00	0.00	0.48	0.00	0.00	0.00	0.48	0.00	0.00	9.58
Castlepoint	6.86	0.55	0.43	0.00	0.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.78
Charminster	5.56	7.72	0.43	0.24	0.59	0.00	0.00	0.00	0.39	0.00	0.00	0.00	0.00	14.94
Kinson	0.19	6.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.39
Southbourne	3.99	0.28	4.18	0.00	0.00	0.00	0.68	0.00	0.00	0.00	0.00	0.00	6.83	15.95
Wallisdown	0.00	4.97	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	5.07
Westbourne	1.48	18.90	0.43	0.00	0.47	0.82	7.54	0.00	0.52	0.00	0.00	0.00	22.76	52.92
Winton	2.50	7.03	0.14	0.69	0.94	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.00	11.77
Other Bournemouth	1.21	0.41	1.43	0.00	0.12	0.00	0.48	0.11	0.00	0.00	0.00	0.00	2.28	6.03
Bournemouth Sub Total	**60.75**	**91.44**	**21.29**	**2.93**	**8.55**	**2.27**	**32.50**	**2.75**	**6.10**	**0.81**	**4.57**	**6.65**	**177.49**	**418.12**
Christchurch														
Christchurch town centre	7.05	3.31	21.05	17.98	2.81	0.14	0.97	0.00	0.00	0.00	8.07	9.29	18.20	88.87
Highcliffe	0.00	0.55	0.57	3.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.13	0.00	6.32
Other Christhurch	0.65	0.00	1.14	1.83	0.00	0.00	0.00	0.00	0.00	0.00	0.43	0.85	2.28	7.18
Christchurch Sub Total	**7.70**	**3.86**	**22.76**	**22.88**	**2.81**	**0.14**	**0.97**	**0.00**	**0.00**	**0.00**	**8.50**	**12.27**	**20.48**	**102.37**
East Dorset														
Ferndown	0.46	3.86	0.14	0.00	8.67	1.95	0.19	0.16	0.00	0.11	0.70	0.00	0.00	16.25
Verwood	0.00	0.55	0.00	0.00	9.32	0.27	0.00	0.00	0.00	0.00	1.02	0.00	4.55	15.71
Wimborne	0.19	5.10	0.00	0.00	5.51	30.58	2.42	8.67	0.83	2.62	1.67	0.00	22.76	80.33
West Moors	0.00	0.97	0.00	0.00	1.70	0.00	0.00	0.53	0.00	0.00	0.00	0.00	0.00	3.19
Corfe Mullen	0.00	0.14	0.00	0.00	0.18	1.00	0.00	0.79	0.00	3.01	0.00	0.00	0.00	5.12
West Parley	0.74	0.55	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.47
Other East Dorset	0.19	0.55	0.00	0.00	1.64	0.09	0.58	0.00	0.00	0.00	0.00	0.00	2.28	5.32
East Dorset Sub Total	**1.58**	**11.72**	**0.14**	**0.00**	**27.19**	**33.90**	**3.19**	**10.15**	**0.83**	**5.74**	**3.39**	**0.00**	**29.58**	**127.40**
Other														
New Forest District	3.52	1.38	1.05	2.24	13.59	2.82	0.48	0.00	0.00	0.35	26.73	36.39	n/a	88.56
North Dorset District	0.00	1.52	0.00	0.00	0.00	0.14	0.00	0.00	0.35	15.37	0.86	0.00	n/a	18.23
Poole	13.91	24.00	0.00	0.38	1.41	4.45	53.78	36.46	7.54	3.36	1.02	3.49	n/a	149.81
Purbeck District	0.83	0.00	0.00	0.00	0.00	0.00	0.68	0.69	9.85	0.46	0.00	0.00	n/a	12.51
Eslewhere	4.45	4.00	2.28	6.07	5.04	1.73	5.13	2.80	18.92	9.31	8.71	26.42	n/a	94.86
Other Sub Total	**22.72**	**30.90**	**3.33**	**8.70**	**20.04**	**9.13**	**60.06**	**39.95**	**36.65**	**28.86**	**37.32**	**66.31**		**363.97**
TOTAL	**92.75**	**137.92**	**47.52**	**34.51**	**58.59**	**45.44**	**96.72**	**52.85**	**43.58**	**35.41**	**53.78**	**85.23**	**227.56**	**1,011.86**

Source: Tables 3 and 4

Table 6 - Future Food and Beverage Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth town centre	38.5%	31.8%	31.5%	5.5%	9.8%	3.3%	25.3%	4.8%	11.9%	1.0%	7.6%	7.8%	64.0%
Boscombe	5.1%	2.5%	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Castlepoint	7.2%	0.4%	0.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Bournemouth	15.3%	32.4%	13.9%	2.7%	3.6%	1.8%	9.0%	0.4%	2.1%	1.3%	0.0%	0.0%	14.0%
Christchurch	8.2%	2.8%	46.4%	66.0%	4.8%	0.3%	1.0%	0.0%	0.0%	0.0%	15.8%	14.4%	9.0%
East Dorset - East	1.5%	4.6%	0.3%	0.0%	36.3%	5.1%	0.8%	1.3%	0.0%	0.3%	3.2%	0.0%	3.0%
East Dorset - West	0.2%	3.7%	0.0%	0.0%	9.7%	69.4%	2.5%	17.9%	1.9%	15.9%	3.1%	0.0%	10.0%
Other	24.0%	21.8%	7.0%	25.2%	34.2%	20.1%	60.9%	75.6%	84.1%	81.5%	69.4%	77.8%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: Table 4 with Lichfields' adjustments - to reflect implementation of Bournemouth town centre cinema/food and beverage development

Table 7 - Future 2023 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2023	**105.37**	**156.25**	**53.91**	**38.96**	**65.31**	**50.58**	**108.30**	**58.97**	**47.93**	**38.97**	**59.88**	**95.02**	**245.88**	**1,125.33**
Bournemouth town centre	40.57	49.69	16.98	2.14	6.40	1.67	27.40	2.83	5.70	0.39	4.55	7.41	157.36	323.10
Boscombe	5.37	3.91	0.00	0.23	0.00	0.00	0.54	0.00	0.00	0.00	0.54	0.00	0.00	10.59
Castlepoint	7.59	0.63	0.49	0.00	1.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.74
Other Bournemouth	16.12	50.63	7.49	1.05	2.35	0.91	9.75	0.24	1.01	0.51	0.00	0.00	34.42	124.47
Christchurch	8.64	4.38	25.01	25.71	3.13	0.15	1.08	0.00	0.00	0.00	9.46	13.68	22.13	113.38
East Dorset - East	1.58	7.19	0.16	0.00	23.71	2.58	0.87	0.77	0.00	0.12	1.92	0.00	7.38	46.26
East Dorset - West	0.21	5.78	0.00	0.00	6.34	35.10	2.71	10.55	0.91	6.20	1.86	0.00	24.59	94.24
Other	25.29	34.06	3.77	9.82	22.34	10.17	65.96	44.58	40.31	31.76	41.56	73.93		403.53
TOTAL	**105.37**	**156.25**	**53.91**	**38.96**	**65.31**	**50.58**	**108.30**	**58.97**	**47.93**	**38.97**	**59.88**	**95.02**	**245.88**	**1,125.33**

Source: Tables 3 and 6

Table 8 - Future 2028 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2028	**118.88**	**175.82**	**60.74**	**43.69**	**72.64**	**56.17**	**120.47**	**65.45**	**52.73**	**42.89**	**66.44**	**105.51**	**268.33**	**1,249.76**
Bournemouth town centre	45.77	55.91	19.13	2.40	7.12	1.85	30.48	3.14	6.28	0.43	5.05	8.23	171.73	357.52
Boscombe	6.06	4.40	0.00	0.26	0.00	0.00	0.60	0.00	0.00	0.00	0.60	0.00	0.00	11.92
Castlepoint	8.56	0.70	0.55	0.00	1.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.97
Other Bournemouth	18.19	56.97	8.44	1.18	2.62	1.01	10.84	0.26	1.11	0.56	0.00	0.00	37.57	138.74
Christchurch	9.75	4.92	28.18	28.84	3.49	0.17	1.20	0.00	0.00	0.00	10.50	15.19	24.15	126.39
East Dorset - East	1.78	8.09	0.18	0.00	26.37	2.86	0.96	0.85	0.00	0.13	2.13	0.00	8.05	51.41
East Dorset - West	0.24	6.51	0.00	0.00	7.05	38.98	3.01	11.72	1.00	6.82	2.06	0.00	26.83	104.21
Other	28.53	38.33	4.25	11.01	24.84	11.29	73.37	49.48	44.35	34.95	46.11	82.09		448.60
TOTAL	**118.88**	**175.82**	**60.74**	**43.69**	**72.64**	**56.17**	**120.47**	**65.45**	**52.73**	**42.89**	**66.44**	**105.51**	**268.33**	**1,249.76**

Source: Tables 3 and 6

Table 9 - Future 2033 Food and Beverage Expenditure Patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Expenditure 2033	**132.99**	**196.35**	**67.98**	**48.83**	**80.55**	**62.18**	**133.56**	**72.42**	**57.87**	**47.08**	**73.49**	**116.77**	**289.07**	**1,379.14**
Bournemouth town centre	51.20	62.44	21.41	2.69	7.89	2.05	33.79	3.48	6.89	0.47	5.59	9.11	185.00	392.01
Boscombe	6.78	4.91	0.00	0.29	0.00	0.00	0.67	0.00	0.00	0.00	0.66	0.00	0.00	13.31
Castlepoint	9.58	0.79	0.61	0.00	1.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.26
Other Bournemouth	20.35	63.62	9.45	1.32	2.90	1.12	12.02	0.29	1.22	0.61	0.00	0.00	40.47	153.36
Christchurch	10.90	5.50	31.54	32.23	3.87	0.19	1.34	0.00	0.00	0.00	11.61	16.81	26.02	140.01
East Dorset - East	1.99	9.03	0.20	0.00	29.24	3.17	1.07	0.94	0.00	0.14	2.35	0.00	8.67	56.82
East Dorset - West	0.27	7.27	0.00	0.00	7.81	43.16	3.34	12.96	1.10	7.49	2.28	0.00	28.91	114.57
Other	31.92	42.81	4.76	12.31	27.55	12.50	81.34	54.75	48.67	38.37	51.00	90.84		496.80
TOTAL	**132.99**	**196.35**	**67.98**	**48.83**	**80.55**	**62.18**	**133.56**	**72.42**	**57.87**	**47.08**	**73.49**	**116.77**	**289.07**	**1,379.14**

Source: Tables 3 and 6

Table 10 - Summary of Food and Beverage Expenditure 2017 to 2033 (£M)

Area	2017	2023	2028	2033
Available Expenditure				
Bournemouth town centre	286.69	323.10	357.52	392.01
Boscombe	9.58	10.59	11.92	13.31
Castlepoint	8.78	9.74	10.97	12.26
Other Bournemouth	113.06	124.47	138.74	153.36
Christchurch	102.37	113.38	126.39	140.01
East Dorset - East	41.95	46.26	51.41	56.82
East Dorset - West	85.45	94.24	104.21	114.57
Total	**647.89**	**721.80**	**801.16**	**882.33**
Benchmark Turnover of Existing Facilities				
Bournemouth town centre (1)	286.69	332.99	349.97	367.83
Boscombe	9.58	10.17	10.69	11.24
Castlepoint	8.78	9.32	9.80	10.30
Other Bournemouth	113.06	120.02	126.14	132.57
Christchurch	102.37	108.67	114.21	120.04
East Dorset - East	41.95	44.53	46.80	49.19
East Dorset - West	85.45	90.70	95.33	100.19
Total	**647.89**	**716.40**	**752.95**	**791.36**

(1) Food & Beverage untis in cinema development added at 2023 - 5,399 sq.m gross @ £5,308 psm

Source: Table 4 with Lichfields' adjustments - to reflect implementation of Bournemouth town centre cinema/food and beverage development

Table 11: Food and Beverage Floorspace Capacity up to 2033

	2017	2023	2028	2033
Surplus/Deficit Expenditure (£m)				
Bournemouth town centre	0.00	-9.89	7.55	24.18
Boscombe	0.00	0.42	1.23	2.08
Castlepoint	0.00	0.42	1.18	1.97
Other Bournemouth	0.00	4.46	12.60	20.79
Sub-Total	**0.00**	**-4.59**	**22.55**	**49.01**
Christchurch	**0.00**	**4.72**	**12.18**	**19.97**
East Dorset - East	0.00	1.73	4.60	7.62
East Dorset - West	0.00	3.54	8.88	14.38
Sub-Total	**0.00**	**5.27**	**13.48**	**22.00**
TOTAL	**0.00**	**5.39**	**48.21**	**90.98**
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,308	£5,578	£5,863
Floorspace Projection (sq.m gross)				
Bournemouth town centre	0	0	1,353	4,124
Boscombe	0	79	220	354
Castlepoint	0	79	211	335
Other Bournemouth	0	840	2,259	3,545
Sub-Total	**0**	**998**	**4,043**	**8,359**
Christchurch	**0**	**889**	**2,184**	**3,406**
East Dorset - East	0	326	825	1,300
East Dorset - West	0	667	1,592	2,452
Sub-Total	**0**	**992**	**2,416**	**3,753**
TOTAL	**0**	**2,879**	**8,643**	**15,518**

Appendix 5: Cinema Assessment

Table 1 - Cinema Trips Annum

Zone	2017	2023	2028	2033
Zone 1 - Bournemouth Central	200,075	214,846	225,014	233,656
Zone 2 - Bournemouth West	306,236	322,971	337,349	349,716
Zone 3 - E. Bournemouth/W. Christchurch	111,943	118,226	123,647	128,469
Zone 4 - Christchurch East/Highclffe	82,870	87,076	90,652	94,050
Zone 5 - Ferndown/Verwood	131,473	136,428	140,848	144,978
Zone 6 - Wimborne	97,401	100,938	104,045	106,928
Zone 7 - Poole East	224,848	234,388	242,020	249,065
Zone 8 - Poole West	127,317	132,246	136,255	139,944
Zone 9 - Purbeck	97,443	99,768	101,882	103,784
Zone 10 - North Dorset	81,202	83,183	84,983	86,607
Zone 11 - Ringwood/Fordingbridge	109,236	113,233	116,634	119,747
Zone 12 - New Forest	178,175	184,937	190,622	195,816
Tourism	111,800	111,800	111,800	111,800
Total	1,860,020	1,940,040	2,005,751	2,064,560

Sources: Population projections Table 1 Appendix 2. Averegae cienam trips per person per annum = 2.6

Table 2 - Cinema Trip Market Shares by Zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow
Bournemouth	64.6%	33.4%	55.6%	29.5%	43.2%	19.6%	11.4%	9.9%	9.9%	16.1%	29.4%	27.5%	60.0%
Christchurch	9.8%	1.5%	33.2%	43.6%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.6%	17.8%	20.0%
Wimborne/East Dorset	0.0%	0.9%	1.4%	0.0%	1.0%	21.3%	0.0%	1.8%	0.0%	20.1%	4.2%	0.0%	20.0%
Sub Total	**74.4%**	**35.8%**	**90.2%**	**73.1%**	**45.2%**	**40.9%**	**11.4%**	**11.7%**	**9.9%**	**36.2%**	**44.2%**	**45.3%**	**100.0%**
Poole	23.4%	63.1%	5.3%	5.1%	51.6%	59.1%	86.3%	79.5%	22.5%	27.0%	34.6%	0.0%	n/a
Dorchester	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	2.3%	7.7%	45.1%	24.7%	3.5%	0.0%	n/a
Southampton	1.0%	0.0%	0.0%	12.3%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%	44.8%	n/a
Eslewhere	1.2%	1.1%	3.1%	9.5%	0.1%	0.0%	0.0%	1.1%	22.5%	12.1%	8.2%	9.9%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2017 (weighted results)

Table 3 - Base Year 2017 Cinema Trips

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Trips 2017	**200,075**	**306,236**	**111,943**	**82,870**	**131,473**	**97,401**	**224,848**	**127,317**	**97,443**	**81,202**	**109,236**	**178,175**	**111,800**	**1,860,020**
Bournemouth	129,248	102,283	62,240	24,447	56,796	19,091	25,633	12,604	9,647	13,073	32,115	48,998	67,080	603,256
Christchurch	19,607	4,594	37,165	36,131	1,315	0	0	0	0	0	11,579	31,715	22,360	164,466
Wimborne/East Dorset	0	2,756	1,567	0	1,315	20,746	0	2,292	0	16,322	4,588	0	22,360	71,946
Sub Total	**148,856**	**109,633**	**100,973**	**60,578**	**59,426**	**39,837**	**25,633**	**14,896**	**9,647**	**29,395**	**48,282**	**80,713**	**111,800**	**839,668**
Poole	46,818	193,235	5,933	4,226	67,840	57,564	194,044	101,217	21,925	21,924	37,796	0	n/a	752,522
Dorchester	0	0	1,567	0	0	0	5,172	9,803	43,947	20,057	3,823	0	n/a	84,369
Southampton	2,001	0	0	10,193	4,076	0	0	0	0	0	10,377	79,822	n/a	106,469
Eslewhere	2,401	3,369	3,470	7,873	131	0	0	1,400	21,925	9,825	8,957	17,639	n/a	76,991
TOTAL	**200,075**	**306,236**	**111,943**	**82,870**	**131,473**	**97,401**	**224,848**	**127,317**	**97,443**	**81,202**	**109,236**	**178,175**	**111,800**	**1,860,020**

Source: Tables 1 and 2

Table 4 - Future 2023 Cinema Trips

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Trips 2023	**214,846**	**322,971**	**118,226**	**87,076**	**136,428**	**100,938**	**234,388**	**132,246**	**99,768**	**83,183**	**113,233**	**184,937**	**111,800**	**1,940,040**
Bournemouth	138,790	107,872	65,733	25,687	58,937	19,784	26,720	13,092	9,877	13,392	33,290	50,858	67,080	631,115
Christchurch	21,055	4,845	39,251	37,965	1,364	0	0	0	0	0	12,003	32,919	22,360	171,761
Wimborne/East Dorset	0	2,907	1,655	0	1,364	21,500	0	2,380	0	16,720	4,756	0	22,360	73,642
Sub Total	**159,845**	**115,624**	**106,639**	**63,653**	**61,665**	**41,284**	**26,720**	**15,473**	**9,877**	**30,112**	**50,049**	**83,777**	**111,800**	**876,518**
Poole	50,274	203,795	6,266	4,441	70,397	59,654	202,277	105,136	22,448	22,459	39,179	0	n/a	786,325
Dorchester	0	0	1,655	0	0	0	5,391	10,183	44,995	20,546	3,963	0	n/a	86,734
Southampton	2,148	0	0	10,710	4,229	0	0	0	0	0	10,757	82,852	n/a	110,697
Eslewhere	2,578	3,553	3,665	8,272	136	0	0	1,455	22,448	10,065	9,285	18,309	n/a	79,766
TOTAL	**214,846**	**322,971**	**118,226**	**87,076**	**136,428**	**100,938**	**234,388**	**132,246**	**99,768**	**83,183**	**113,233**	**184,937**	**111,800**	**1,940,040**

Source: Tables 1 and 2

Table 5 - Future 2028 Cinema Trips

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Trips 2028	**225,014**	**337,349**	**123,647**	**90,652**	**140,848**	**104,045**	**242,020**	**136,255**	**101,882**	**84,983**	**116,634**	**190,622**	**111,800**	**2,005,751**
Bournemouth	145,359	112,675	68,748	26,742	60,846	20,393	27,590	13,489	10,086	13,682	34,290	52,421	67,080	653,402
Christchurch	22,051	5,060	41,051	39,524	1,408	0	0	0	0	0	12,363	33,931	22,360	177,749
Wimborne/East Dorset	0	3,036	1,731	0	1,408	22,162	0	2,453	0	17,082	4,899	0	22,360	75,130
Sub Total	**167,410**	**120,771**	**111,529**	**66,267**	**63,663**	**42,555**	**27,590**	**15,942**	**10,086**	**30,764**	**51,552**	**86,352**	**111,800**	**906,281**
Poole	52,653	212,867	6,553	4,623	72,677	61,491	208,863	108,323	22,923	22,945	40,355	0	n/a	814,276
Dorchester	0	0	1,731	0	0	0	5,566	10,492	45,949	20,991	4,082	0	n/a	88,811
Southampton	2,250	0	0	11,150	4,366	0	0	0	0	0	11,080	85,399	n/a	114,245
Eslewhere	2,700	3,711	3,833	8,612	141	0	0	1,499	22,923	10,283	9,564	18,872	n/a	82,138
TOTAL	**225,014**	**337,349**	**123,647**	**90,652**	**140,848**	**104,045**	**242,020**	**136,255**	**101,882**	**84,983**	**116,634**	**190,622**	**111,800**	**2,005,751**

Source: Tables 1 and 2

Table 6 - Future 2033 Cinema Trips

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Inflow	Total
Trips 2033	**233,656**	**349,716**	**128,469**	**94,050**	**144,978**	**106,928**	**249,065**	**139,944**	**103,784**	**86,607**	**119,747**	**195,816**	**111,800**	**2,064,560**
Bournemouth	150,942	116,805	71,429	27,745	62,630	20,958	28,393	13,854	10,275	13,944	35,206	53,849	67,080	673,110
Christchurch	22,898	5,246	42,652	41,006	1,450	0	0	0	0	0	12,693	34,855	22,360	183,160
Wimborne/East Dorset	0	3,147	1,799	0	1,450	22,776	0	2,519	0	17,408	5,029	0	22,360	76,488
Sub Total	**173,840**	**125,198**	**115,879**	**68,751**	**65,530**	**43,733**	**28,393**	**16,373**	**10,275**	**31,352**	**52,928**	**88,705**	**111,800**	**932,758**
Poole	54,676	220,671	6,809	4,797	74,808	63,194	214,943	111,255	23,351	23,384	41,432	0	n/a	839,321
Dorchester	0	0	1,799	0	0	0	5,728	10,776	46,807	21,392	4,191	0	n/a	90,692
Southampton	2,337	0	0	11,568	4,494	0	0	0	0	0	11,376	87,726	n/a	117,501
Eslewhere	2,804	3,847	3,983	8,935	145	0	0	1,539	23,351	10,479	9,819	19,386	n/a	84,288
TOTAL	**233,656**	**349,716**	**128,469**	**94,050**	**144,978**	**106,928**	**249,065**	**139,944**	**103,784**	**86,607**	**119,747**	**195,816**	**111,800**	**2,064,560**

Source: Tables 1 and 2

Table 7 - Cinema Facilities in the Study Area

Area	Screens	Seats	Benchmark Trips
Odeon, Bournemouth	10	1,686	354,060
Regent, Christchurch	1	484	101,640
Tivoli, Wimborne	1	500	105,000
TOTAL	**12**	**2,670**	**560,700**

Source: *UK Cinemas*
Benchmark average = 210 trips per seat

Table 8 - Cinema Capacity 2017 to 2033

	2017	2023	2028	2033
Cinema Trips				
Bournemouth	603,256	631,115	653,402	673,110
Christchurch	164,466	171,761	177,749	183,160
East Dorset	71,946	73,642	75,130	76,488
Total	**839,668**	**876,518**	**906,281**	**932,758**
Benchmark Trips for Existing Facilities				
Bournemouth	354,060	354,060	354,060	354,060
Christchurch	101,640	101,640	101,640	101,640
East Dorset	105,000	105,000	105,000	105,000
Total	**560,700**	**560,700**	**560,700**	**560,700**
Surplus Trips				
Bournemouth	249,196	277,055	299,342	319,050
Christchurch	62,826	70,121	76,109	81,520
East Dorset	0	0	0	0
Total	**312,022**	**347,176**	**375,451**	**400,570**
Seat Capacity				
Bournemouth	1,187	1,319	1,425	1,519
Christchurch	299	334	362	388
East Dorset	0	0	0	0
Total	**1,486**	**1,653**	**1,788**	**1,907**

Appendix 6: Household Survey Results

Household Survey Structure

NEMS Market Research carried out a telephone survey of 1,500 households across the study area in April 2017. The study area was split into 12 zones, based on postcode sector boundaries. In order to provide statistically reliable sub-samples 100 completed interviews were undertaken in each zone. The main aims of the survey were to establish patterns for the following:

- main food and top up grocery shopping;
- non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items;
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts); and
- leisure activities.

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