Boscombe Retail Study

September 15, 2016
Executive Summary

Catchment and Demographics

- Boscombe’s Principal catchment, updated with 2015 population figures, contains 284k residents and 66k shoppers, equating to a shopper penetration rate of 23%

- Residents are generally younger than UK average in the Inner segment where the proportion of Pre-Family households is 32% above average. However, in the Outer segment, residents are older than average, with Retired Seniors 41% above UK average and Pre-Family and Family 17% and 15% below average respectively.

- Household income is £35k, which falls 7% below UK average in the Inner segment and 4% below average in the Outer, meaning that those living closest to Boscombe are less well-off. Non-Grocery and Food spending reflect this pattern, and respectively fall 9% and 7% below UK average overall. Development of a more appropriate, well-presented retail offer might encourage a higher spend.

- Despite this, Boscombe’s catchment is more affluent than UK average overall on an ACORN basis, with Affluent Achievers accounting for 28% of residents (+27% UK average) and Urban Adversity, the least affluent Category, accounting for just 14% (-19% UK average). However, this is driven by the Outer segment which is significantly better-off yet accounts for fewer shoppers, whilst the Inner segment is much less affluent than UK average.

- Boscombe’s shopper profile is less affluent than that of its residents, probably reflecting the dominance of less affluent Categories within the Inner segment but also the impact of the retail offer which is less attractive to middle and upper-income visitors.

- Non-Grocery shopper spend within the catchment amounts to £293m annually, with Tourists contributing an additional £58m on top of this.
Executive Summary

- FSP’s view, based on analysis of demographics, competition and Boscombe’s traditional retail positioning is that its future strategy should therefore primarily appeal to its Young and Family less affluent shoppers from the Inner catchment, whilst also providing elements which will differentiate Boscombe from nearby competitors (e.g. Bournemouth, Castlepoint Shopping Park, Poole) and persuade a wider range of residents of the Outer segment to visit.

Trading Gap

- Non-Grocery sales in Boscombe are estimated at £48m achieving a market share of 16% of available shopper spending. FSP estimates that Boscombe’s Trading Gap (the realistic level of potential turnover which Boscombe could achieve through improvements) is £39m, £36m of which is available from existing shoppers.

- The largest opportunity is within Clothing & Footwear (£22m), followed by Personal Goods (£5m) and Food & Beverage (F&B), which has a gap of £5m.

- FSP has also identified specific under-performing areas of Boscombe’s catchment which can be targeted to increase spend in Boscombe. These are generally more affluent areas within the Outer catchment.

Future Tenant Mix

- In developing a relevant future strategy, Boscombe needs to be differentiated from other retail areas in Bournemouth and must emphasize the town’s strengths within its retail offer: value, creativity and independence.
Executive Summary

FSP recommends:

- Reducing the scale of the retail offer by converting areas of weak retailing, essentially on areas of Christchurch Road, to residential and commercial use.
- Encouraging Independent retailing in order to differentiate itself from nearby towns. The likelihood of Boscombe attracting major national multiples is low so FSP believes that the town should pursue a policy of retail eclecticism by encouraging and nurturing Independent specialists. This is a process which the Council is already pursuing to an extent and developing/marketing it further is likely to offer the town its best chance to broaden appeal, especially to those in the *Outer* segment.
- Promoting markets (vintage, street, *F&B*) to reinforce a point of difference for Boscombe.
- Encouraging a strategy for each retailing area within the town: for example supporting Sovereign Centre/The Precinct as the prime destination for national multiple retailers.
- Promoting the Royal Arcade as a destination for eating out (e.g. cafes/delicatessens) or crafts (e.g. artisan jewelers, ceramics and art galleries) would provide a more cohesive retail offer.
- Including community services within the town centre: this strategy would not only reduce the number of vacant units within the town centre but would also drive footfall to the main retail area.

Given inevitably limited resources, FSP recommends, as a priority, working towards a reduction in overall retail space to push up sales densities, building upon the existing convenience-based value offer and reinforcing it by encouraging creative independent operators to locate in the town. This should eventually drive towards a condensed retail hub with more vibrancy and variety.
Leasing Summary
Boscombe, Bournemouth

Catchment Size
284k residents
66k shoppers

Catchment Spend
Residents £1.1bn (incl. ‘pull in’)
Shoppers £292m (incl. ‘pull in’)

Trading Gap Potential
Potential for £39m in additional turnover

High Penetration
Penetration is 36% within the Inner segment

High C&F Spend Potential
£22m additional C&F turnover available

Young Catchment
23% Pre-Family, 16% above UK average

“Boscombe has the potential to provide a highly relevant mix of value-based high-street brands, alongside an eclectic range of independent retailers, entirely suited to its resident base”

ACORN Profile
High-spending Comfortable Communities and Affluent Achievers dominate overall catchment (28% residents)

Key Tenants

Tourist Spend
Non-Grocery spend by Tourists is £58m annually

Source: FSP/CES/CACI/NSLSP

Shopping Locations

% Residents

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<thead>
<tr>
<th></th>
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<tr>
<td>Urban Adversity</td>
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High Penetration
Penetration is 36% within the Inner segment

High C&F Spend Potential
£22m additional C&F turnover available

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“Boscombe has the potential to provide a highly relevant mix of value-based high-street brands, alongside an eclectic range of independent retailers, entirely suited to its resident base”
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Introduction

Following FSP’s 2014 research as part of a larger study for the Coastal Business Improvement District, Boscombe Regeneration Partnership (BRP) commissioned a retail study to understand current and future trends within Boscombe to inform its redevelopment strategy. FSP has made realistic recommendations for the future of Boscombe’s retailing and the wider strategy.

The following is included within this report:

- Boscombe’s 2014 catchment, alongside a full range of demographic information, with income and spending updated to the most recent data
- Comparison to similar trading locations
- Information on projected population growth and proposed housing developments
- Trading Gap analysis to identify opportunities to grow sales in Boscombe
- Absent retailers
- A SWOT analysis of Boscombe’s retail offer
- Commentary on Boscombe retail offer including recommendations relating to future opportunities
Section 1: Catchment & Demographics
Catchment Area

The map shows Boscombe’s Principal (90%) catchment area, as reported in 2014, and derived from 703 postcodes collected over a full trading week. Populations have been updated to 2015 estimates. The *Inner* segment represents the home location of 75% of Boscombe's shoppers and the *Outer* segment a further 15%. The last 10% has been disregarded as a shopper penetration rates beyond the Principal catchment are usually very low. For a full list of postal sectors by segment please see Appendix 1.

- The *Inner* segment has a resident population of 155k, extending to Westbourne and Winton to the west, beyond Christchurch to the east and towards Ferndown in the north.
- The *Outer* segment covers a largely rural area towards New Milton in the east and includes Kinson, Wallisdown and Poole’s Tower Park Entertainment Centre. This segment also includes Bournemouth University’s Talbot Campus, and has a total population of 129k.
- The total resident population for the Principal catchment area is 284k.

The resident population is expected to increase by a slower rate than the UK, by 3% to 2025 (UK+7%).

Source: FSP/NSLSP
Shopping Population

The shopping population represents the proportion of the resident population using Boscombe as a shopping destination. The total shopper population also includes a 10% ‘pull in’ figure which relates to those who use Boscombe town centre but live outside the Principal catchment area. The shopping populations (updated to 2015 populations) are:

- **Inner** segment 55k – 36% penetration
- **Outer** segment 11k – 8% penetration

The Principal catchment produces 66k shoppers (73k incl. ‘pull-in’). Penetration is 23% based on the bespoke postcode catchment. This was agreed in 2014 as the most appropriate catchment basis for Boscombe as other, more standardised approaches such as the National Survey of Local Shopping Patterns (NSLSP) would ‘under-score’ the town’s attraction.

In fact, the NSLSP Principal (90%) catchment has a resident population of 540k and a penetration of 3% (typical penetration for ‘Minor District’ Centres as Boscombe is classified is 5%) generating a shopping population of only 19k. This is lower than the bespoke catchment because the NSLSP asks respondents the location of their ‘Main’ *Non-Food* shopping destination. In the 2014 research, few people will have chosen Boscombe as their main *Non-Grocery* shopping destination.

Source: FSP/CES
Catchment Demographics – Resident Lifestage

Catchment households have been classified into four Lifestage groups: Pre-Family: Main wage earner, under 45, no children; Family: Any age, dependent children living at home; Empty Nesters: 45-69, no dependent children at home; Retired Seniors: 70+, no dependent children at home.

The graph shows the demographic characteristics of the Principal catchment compared to UK averages represented by Index 100. Data has been updated to 2015.

- Boscombe’s resident profile contains above UK average proportions of both Pre-Family (+16%) and Retired Seniors (+14%)
- The Inner segment, closest to Boscombe, is generally younger in profile than the Outer. Pre-Family is 32% higher than UK average in the Inner segment, whilst the overall prevalence of Retired Seniors is driven by the Outer segment, where they are 41% above UK average
- Empty Nesters account for the most residents (32%) and despite being 17% below UK average overall, Family are also a dominant Lifestage Group (28% of residents)

<table>
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<th>Lifestage</th>
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<th>Outer Index</th>
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<td>UK %</td>
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</table>
Catchment Demographics – Resident Age

The graph shows the current age profile of residents across the catchment compared to UK average, represented by Index 100. Data shown is from 2015.

- The age profile generally mimics the Lifestage profile, although additionally shows that the high proportion of Pre-Family shoppers is driven by 15-24 year-olds (+17% UK average in the Inner segment), rather than by 0-15s which are 15% below UK average overall.

- Alongside this younger market, elderly residents are also fairly prevalent, with those at retirement age and older at 9% above UK average in the Inner segment; 26% higher overall.

- Development of the retail mix will therefore need to appeal to both of these very different shoppers. National multiples and Fashion operators would be attractive for younger shoppers, whilst F&B such as cafés would be popular amongst older residents and also hold wider appeal.

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<thead>
<tr>
<th></th>
<th>0-15</th>
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<th>25-44</th>
<th>45-retired</th>
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Source: FSP/CES
Household Income and Expenditure

The graph highlights the relationship between average resident household income and retail expenditure on *Food* and *Non-Grocery*. While income provides a good indication of catchment affluence, it tells only a partial story about the propensity for retail spending. Again, please note that data has been updated to 2015 figures.

- Average household income in Boscombe is £35k, 5% below the UK average of £37k
- *Non-Grocery* and *Food* spend are also below UK average, by 9% and 7% respectively

<table>
<thead>
<tr>
<th></th>
<th>Household Income</th>
<th>Non-Grocery Spend</th>
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<td>UK</td>
<td>£37,223</td>
<td>£9,922</td>
<td>£5,037</td>
</tr>
</tbody>
</table>

Source: FSP/CES
Catchment residents have been classified by ACORN (A Classification Of Residential Neighbourhoods). This information is derived from the 2014 sample.

- The most affluent Category, *Affluent Achievers*, is 27% above UK average. This is driven by the *Outer* segment, whilst the *Inner* segment is less affluent. Within this Category, over 50% are *Mature Money* who have an older age profile.

- *Comfortable Communities* are 3% above UK average but below average in the *Inner* segment.

- *Financially Stretched* and *Urban Adversity* are both below UK average overall but are respectively 10% and 13% above average in the *Inner* segment.

Full ACORN definitions can be found in Appendix 2.
ACORN Category Profile – Residents vs. Shoppers

The adjacent graph shows the ACORN profile of Boscombe’s shoppers (survey respondents) indexed against catchment residents, as in the 2014 report. Profiles at Group level can be found in Appendix 3.

- Boscombe shoppers are less affluent in profile than residents: Affluent Achievers and Comfortable Communities are under-represented as shoppers compared to resident proportions, whilst Financially Stretched and Urban Adversity are over-represented.

- This is a reflection of the dominant less affluent Categories within the Inner segment where conversion of residents to shoppers is higher. It is also a function of the current retail offer, which is unlikely to persuade more affluent shoppers to visit Boscombe rather than nearby locations such as Bournemouth and Castlepoint Shopping Park.

- Between 2014 and 2016, Boscombe’s catchment has become marginally more affluent, but is generally similar in profile.

Source: FSP/CACI
Household Income

The adjacent map shows average household income vs. UK average; darker sectors indicate higher incomes. Boscombe’s Principal catchment is outlined in black.

Households are generally more affluent in largely rural areas in the far north and north-east of the catchment, and there is also a small line of affluence between Castlepoint Shopping Park and Boscombe. Given the current comparative retail offers the former is more likely to attract affluent shoppers.

Castlepoint currently provides a strong high-street offer which is more targeted towards Young shoppers, as well as a range of Household Goods stores (e.g. Lakeland and Robert Dyas) and F&B operators (Frankie & Benny’s and Nando’s). Fashion tenants include H&M, Gap, TK Maxx, River Island and Topshop.

Households close to the coast, and those in the west and south-east of the catchment, are less affluent than UK average.

Source: FSP/CES
Resident Spending

- Total Non-Grocery resident expenditure amounts to £1.3bn annually (including ‘pull in’)
- Clothing & Footwear (C&F) and Household Goods are the largest markets, annually worth £315m and £195m respectively (including ‘pull in’)
- F&B is also a large market, worth £270m annually (including ‘pull in’)
- Resident Non-Grocery expenditure is almost identical across the Inner and Outer segments with both worth £574m

Source: FSP/CES
Shopper Spending

- Total Non-Grocery shopper spend (spend by those residents who use Boscombe regularly as a shopping location) amounts to £293m (including 10% ‘pull in’)
- C&F and Household Goods are the largest markets, respectively worth £72m and £68m annually (including 10% ‘pull in’)
- F&B is also a large market, annually worth £62m (including 10% ‘pull in’)
- Shopper spending is highest in the Inner segment at £207m, accounting for 79% of Principal catchment shopper spend
- Spend by Boscombe’s 22k office workers* is largely included under these figures as the economy is predominantly local and therefore most employees are likely to live and shop locally

*Please note the volume of office workers within Boscombe is defined by those within a 30 minute walk-time being potentially the maximum figure available to use

Source: FSP/CES
Benchmarking
The chart identifies the centres most similar to Boscombe on the basis of the ACORN profile of shoppers derived from the National Survey of Local Shopping Patterns (NSLSP) catchment (right-hand scale). The NSLSP is one of the world’s largest household surveys and is used to determine shoppers’ main destination for Non-Grocery shopping. The chart uses a correlation coefficient to indicate the degree of similarity. Generally speaking, ACORN correlations need to be in excess of 0.7 to indicate significant similarities between centres. Shopper population, shown by the bars, relates to the left-hand scale.

- The ACORN profile of Boscombe shoppers is most similar to Weston Super Mare and Hastings.
- In terms of NSLSP shopper population size; Boscombe is most similar to Dover and Bognor Regis.

Source: FSP/NSLSP/CACI
Section 2: Trading Gap
Retail Supply and Demand

Comparing retail sales estimates (based on the FSP field audit) with catchment spending (£293m, plus an additional £58m annually received from Tourism) highlights market shares and gaps. FSP has analysed a range of data in order to derive a realistic estimate of the potential level of turnover that Boscombe can achieve – the Trading Gap.

- **Non-Grocery** sales in Boscombe town centre as a whole amount to an estimated £48m – 16% market share
- 29% of Boscombe’s total sales originate from Sovereign Centre
- The Trading Gap is £39m – details are described overleaf

![Graph showing retail sales and trading gap](chart.png)

Source: FSP/CES

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**Boscombe Retail Sales**
- £28m

**Sovereign Centre Retail Sales**
- £20m

**Trading Gap**
- £39m

Source: FSP/CES
Trading Gap

Whilst attracting all resident catchment spend to Boscombe is not achievable, the Trading Gap provides a realistic level of additional turnover which Boscombe can attain. The Trading Gap consists of three elements: the Market Share Gap, the Shopper Gap and the Catchment Gap. FSP estimates the Trading Gap in Boscombe to be worth £39m.

- **Market Share Gap** – The level of additional turnover that could be achieved by increasing the proportion of spend of current shoppers to match that of shoppers in similar centres – would provide additional turnover of £36m

- **Shopper Gap** – The value created by increasing shopper numbers from specific under-performing areas within the catchment. It is worth £3m

- **Catchment Gap** – The value created if current shopper penetration across the catchment can be increased overall. The Catchment Gap is challenging to achieve as it involves attracting new shoppers, and owing to the high level of surrounding competition, this is unlikely to be achieved at Boscombe
Trading Gap By Merchandise Group

The chart below shows the Trading Gap across the main Merchandise Groups, identifying opportunities for turnover growth.

- The largest opportunity to increase sales is within C&F, with a gap worth £22m; £21m of which is available from existing shoppers.
- *Personal Goods* also presents a large opportunity, with a Trading Gap amounting to £5m. Almost all of this is available from current shoppers.
- There is an opportunity of £5m within *F&B*. Improving existing outlets, attracting key high-street tenants and developing the range of Independent caterers would appeal to a wider range of visitors.
- The opportunities in *Leisure Goods* and *Household Goods* are slightly smaller (£4m and £3m respectively), but gaps within all Merchandise Groups suggest capacity for expansion and upgrading of the offer more generally.

Source: FSP/CES
Shopper Gap – Under-performing Zones

FSP has identified postal sectors within Boscombe’s Principal catchment where the Actual Shopper penetration is significantly less than the Expected penetration. The map below shows the under-performing postal sectors grouped into Zones deemed to be most achievable targets for Boscombe. Commentary is provided on page 27.
Shopper Gap Under-performing Zones by ACORN

The chart shows the ACORN profiles of the individual Shopper Gap Under-performing Zones identified compared to the ACORN profile of residents and shoppers. Understanding the profile of the individual areas is relevant to Boscombe’s marketing strategy.

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<tr>
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Source: FSP/CACI
Shopper Gap Under-performing Zones - Commentary

- **Under-performing Zone 1** – This Zone has the potential to provide 2k additional shoppers and £4.8m in turnover. The population profile is affluent, meaning that attracting visitors is likely to be challenging without considerable changes to the retail offer. Proximate destinations such as Poole compete for these visitors and Tower Park (cinema, bowling, waterpark and F&B) presents challenges for evening or Leisure visits. However, those within the south-east of this Zone in particular could be persuaded to visit Boscombe if an appropriate and differentiated offer was developed (e.g. addition of more independent, eclectic retailers into the tenant mix and extending the range of targeted F&B).

- **Under-performing Zone 2** – This Zone has the potential to provide 2k additional shoppers and £4.1m in turnover. Castlepoint SP will compete for shoppers living in the north of this Zone, but there is an opportunity to pull visitors from southern and western areas. The population is most affluent in this Zone (56% of residents are Affluent Achievers vs. 22% within Boscombe) but despite the challenges involved in targeting Under-performing Zones 1 and 2 given their comparative level of affluence, developing the offer as above could prove lucrative and would also appeal to tourists. However, any strategy must be careful not to alienate the more deprived Inner segment (75% shoppers).

- **Under-performing Zone 3** – This Zone contains 2k potential additional shoppers and £3.4m in turnover. The population profile is similar to Boscombe’s but deprivation is lower, with more middle-income Comfortable Communities (45% of shoppers vs. 22% in Boscombe). Whilst Castlepoint will be a key competitor, providing a differentiated offer would again be persuasive to potential visitors.
Under-performing Zone 4 – This Zone holds the most potential value, with £5.2m in potential turnover uplift and 3k additional shoppers. Shoppers are less affluent here (33% are Financially Stretched) but could be drawn to Boscombe for day trips given the limited offer in nearby locations such as Kinson. However, Castlepoint SP is a compelling competitor so, as is relevant in all instances, differentiating Boscombe’s offer is crucial.
Section 3: Present Tenant Mix
Boscombe Retailing Overview

The plan overleaf shows the main shopping area for Boscombe, that for the whole Study Area is at Appendix 4. The retail destinations, together with their role, are described below.

- **The Precinct:**
  - The core pedestrianised shopping area containing the majority of national multiples in Boscombe and the outdoor market (Thursday/Saturday)
  - Re-paved but showing signs of wear and tear. There is little softening using seats and planters so the overall feel is hard. Facades are a mix of pleasant Victorian but with 60/70’s building interspersed. The condition of many buildings is poor
  - The overwhelming feel is one of unremitting ‘value’ which, in essence, has been the traditional retail stance of Boscombe reflecting the lower affluence of the population and, more latterly and anecdotally, the high ethnic mix. Even in this core area there are many charity shops
  - *Clothing and Footwear* is represented by stores targeting the family market eg Store Twenty One, Bonmarche. New Look previously did so but has now closed its store
  - Primark is the key *Non-Food* anchor in the town since M&S left Boscombe and TJ Hughes closed when it went into administration. The Primark store is small (selling area just under 17k ft\(^2\)) and appears to be merchandised at a low level
  - *Food and Beverage* (*F&B*) is generally of the café/snack type though Café Boscanova offers a wider range and looks popular
  - The well-known O2 Academy (music venue) is located just off The Precinct
Boscombe Retailing Plan

Source: FSP/GOAD
Boscombe Retailing Overview

- **Grocery** is well-represented in the town centre with Sainsbury’s, Lidl and Aldi plus a range of smaller supermarkets – some **Catering** specifically for the large ethnic population

**The Sovereign Centre:**
- Just under 129k ft² and owned by New River Retail (NRR). Main anchors are Wilko, Peacocks, Poundland, Sports Direct, Boots. Pep & Co opened a year ago and, with a selling area of just over 3k ft², is reported to have sales of c£375k inc VAT – a low sales density providing an indication of local performance
- Plans involving the potential re-allocation of the original TJ Hughes space to a cinema and restaurants, thereby creating a mixed use destination, unfortunately failed to progress. The concept, which would have helped to kick-start the evening economy, would have been a positive step for the town
- TJ Hughes was instead replaced by Zervo Flexi-Village – an indoor market which has attracted a number of stall holders away from The Precinct. A more permanent replacement (Poundland & More) is rumoured to be planned for the area further strengthening the town’s value offer
- The recent loss of New Look, a tenant of the Centre though fronting on to The Precinct, represents a blow for the town. In more positive news Warren James is reported to have been recruited, Costa is moving to a larger space and Perfume Shop has renewed its lease
Boscombe Retailing Overview

The Royal Arcade:
- The potential ‘jewel in the crown’ of Boscombe retailing – it houses a number of small units, with space above, enclosed within a delightful Victorian structure.
- Though representing the main opportunity for assembling a mix of like-minded retailers targeting (potentially) a slightly more upmarket and eclectic shopper base, the Arcade has signally failed to capitalise on this strategy. Instead, the range of operators is haphazard and clearly suffers from a lack of strong asset management pursuing a clear objective. Opening hours are reportedly flouted resulting in shoppers’ understandable confusion and lack of commitment/loyalty to the Arcade.
- Attracting new retailers to Boscombe is undoubtedly challenging but a continuation of current asset management policies here is unlikely to maximise potential. A recently opened baker was interviewed for this report and reported little assistance from the Arcade owners in resolving problems relating to the store, prejudicing the store’s continued trading.

Christchurch Road:
- The long road representing the traditional heart of retailing in Boscombe through into Pokesdown.
- Outside the pedestrianised core of Boscombe’s shopping the standard of retailing drops substantially. There is a surfeit of badly maintained, mostly small units which endure low footfall and present a highly fragmented and, with a number of notable exceptions, unappealing offer.
Boscombe Retailing Overview

- There is a history of antique stores in the Pokesdown end of Christchurch Road. On inspection, it would appear that many owners also operate online and/or on market stalls using the shops as storage. There are undoubtedly a number of good traders but also many which keep fluctuating opening hours and do little to enhance the overall attraction of the area.

- Inevitably, there will be independent operators with a strong vision, prepared to work hard and establish a credible business in an area where occupancy costs are relatively limited (eg Little Pickle Deli Cafe, Monty’s Lounge). Such retailers make a positive contribution to shopping in the area and Boscombe will benefit from encouraging more of them to the town.

- Boscombe’s ethnic mix has changed over the last 10 years with an influx of East Europeans. It is a retailing inevitability that hard-working newcomers to the town will seek to open in the cheapest places and eventually form a network of adjacent stores appealing specifically to their own (but often other) communities. Properly managing these developments adds vitality to the town centre and is far from detrimental. Areas of Christchurch Road, probably outside of the pedestrian core, are likely to be the main destinations.

- **The Beach:** Approximately 0.5 miles (10-12 mins walk) from Christchurch Road and with retail of its own, primarily F&B. Linking the audiences for these two destinations is probably not feasible but clearly those using the beach in summer represent an additional group of target shoppers. Prime Merchandise Categories are likely to be further F&B, top-up and replacement goods as well as standard pharmacy, toiletries etc.
Clothing & Footwear Supply and Demand by FISH

The pie charts below show the distribution of C&F turnover based on the FISH segmentation of retailers (see Appendix 5 for full FISH definitions). FISH segments shoppers by their attitude towards themselves, their self-image, and by their attitude towards their purchase, what they hope it will say about them.

- Potential spend by Boscombe’s shoppers is weighted towards Assured (31%), with large proportions also directed into Young (24%) and Family (22%). Classic also attracts 18% of spend.

- However, sales within Boscombe as a whole are dominated by Family (77%), suggesting a hefty over-provision of this Group. The Assured market will be difficult to target for Boscombe but Young and Classic retailers also account for a lower proportion of sales than that indicated by the potential spend potential. Therefore, readdressing the balance away from Family more generally presents a considerable opportunity.

Source: FSP/CES

September 15, 2016
## Clothing & Footwear Market Segmentation

<table>
<thead>
<tr>
<th></th>
<th>Fashionable</th>
<th>Individual</th>
<th>Safe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young</td>
<td>New Look</td>
<td>Clobber</td>
<td>JD</td>
</tr>
<tr>
<td></td>
<td>JR Fashion</td>
<td>The Attic</td>
<td>Verb</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Geek Boutique</td>
<td></td>
</tr>
<tr>
<td>Assured</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>Baby Moos</td>
<td>Peacocks</td>
<td>Pep &amp; Co</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roman</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>ShoeZone</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Store Twenty One</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Primark</td>
<td></td>
</tr>
<tr>
<td>Classic</td>
<td>The Ivy Gate</td>
<td>Bonmarche</td>
<td>Chameleon</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roman</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roses &amp; Garters</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pep &amp; Co</td>
<td></td>
</tr>
<tr>
<td>Old</td>
<td>Sovereign Centre shops</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Boscombe shops</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: FSP/CES
Clothing & Footwear Market Segmentation

- Boscombe’s retail mix is weighted significantly towards the *Family Safe* segment and so caters essentially for those living in close proximity rather than comprising a persuasive retail offer sufficient enough to draw other shoppers to the area (particularly affluent residents living in the *Outer* segment). The same issue exists within *Young*, which is both lower value and originally limited to just two national multiples. When the FSP audit was conducted New Look was still open, hence its inclusion on the previous page grid. The store has now closed – this is a negative development for the town’s retailing as Boscombe’s demographic profile suggests an opportunity exists in this sector, probably value-based, but the original lack of critical mass hampering its performance and development has now been exacerbated by New Look’s departure.
The *C&F* Trading Gap amounts to £22m. The breakdown is shown on the grid using indicative absent retailers.

- The *Assured* segment theoretically presents the highest opportunity for growth with a gap of £8m but is broadly unavailable to Boscombe with its present market positioning except in respect of independent operators capable of fine-tuning a discrete offer specifically targeted to the local market.

- Both *Family* and *Classic* have a gap of £5m. *Family* operators currently dominate in Boscombe, many highly value-oriented. The suggested retailers are appropriately price-positioned, but offer a wider Fashion offer and appeal to a wider spectrum of both young and older visitors.

- There is an opportunity of £4m within *Young* – suggested retailers include Select, Blue Inc and Quiz.

<table>
<thead>
<tr>
<th></th>
<th>Fashionable</th>
<th>Individual</th>
<th>Safe</th>
<th>Homely</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Young</strong></td>
<td>QUIZ</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£4m</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Assured</strong></td>
<td></td>
<td>Am Summers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>£8m</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£5m</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Classic</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£5m</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Old</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>£0.7m</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Source: FSP/CES/Retail Locations
Benchmark Absent Retailers

The recruitment of a selection of the absent retailers below would assist in improving Boscombe’s retail mix and achieve a higher market share. Retailers marked with an asterisk are located in similar towns identified earlier in the report.

<table>
<thead>
<tr>
<th>Clothing and Footwear</th>
<th>Personal</th>
<th>Household</th>
<th>Leisure</th>
<th>Catering</th>
<th>Large Space Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann Summers*</td>
<td>Body Shop, The*</td>
<td>Home Bargains</td>
<td>Blacks</td>
<td>Frankie &amp; Benny’s</td>
<td>B&amp;M</td>
</tr>
<tr>
<td>Blue Inc.*</td>
<td>Claire’s*</td>
<td>Linens Direct</td>
<td>Clintons*</td>
<td>Harry Ramsden’s</td>
<td></td>
</tr>
<tr>
<td>Burton*</td>
<td>H Samuel*</td>
<td>Maplin</td>
<td>DW Sports</td>
<td>Muffin Break</td>
<td></td>
</tr>
<tr>
<td>Clarks*</td>
<td>Lush</td>
<td>MenKind</td>
<td>Entertainer, The</td>
<td>Nando’s</td>
<td></td>
</tr>
<tr>
<td>Deichmann</td>
<td>Original Factory Shop, The*</td>
<td>O2*</td>
<td>Max Spielmann</td>
<td>Pizza Hut</td>
<td></td>
</tr>
<tr>
<td>Dorothy Perkins*</td>
<td>Perfume Shop, The*</td>
<td>Range, The</td>
<td>Millets*</td>
<td>Starbucks*</td>
<td></td>
</tr>
<tr>
<td>Edinburgh Woollen Mill*</td>
<td>Sally</td>
<td>Three (3 Store)*</td>
<td>Mountain Warehouse*</td>
<td>Subway*</td>
<td></td>
</tr>
<tr>
<td>Greenwoods Menswear</td>
<td></td>
<td>Vodafone*</td>
<td>Ryman</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotter</td>
<td></td>
<td></td>
<td>Trespass*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M&amp;Co*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pavers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quiz</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TK Maxx*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yours</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Source: FSP
Section 4: Zonal Considerations
Retail Zoning

The map below shows the main study area broken down into distinctive Retail Zones and displays the overall sales area, total estimated *Non-Food* sales and average sales density per area*. Sales density is defined as estimated turnover including VAT divided by estimated selling space in ft².

- **Retail Zone 1**
  - Sales: £19.1m
  - Selling Area: 93kft²
  - Sales Density: £205/ft²**

- **Retail Zone 5**
  - Sales: £3.1m
  - Selling Area: 18kft²
  - Sales Density: £173/ft²

- **Retail Zone 2**
  - Sales: £2.0m
  - Selling Area: 8kft²
  - Sales Density: £238/ft²

- **Retail Zone 3**
  - Sales: £0.6m
  - Selling Area: 4kft²
  - Sales Density: £161/ft²

- **Retail Zone 4**
  - Sales: £16.4m
  - Selling Area: 57kft²
  - Sales Density: £287/ft²

- **Retail Zone 6**
  - Sales: £5.9m
  - Selling Area: 25kft²
  - Sales Density: £238/ft²

*Analysis excludes vacant units, *Grocery* and *Services*; **Sales Density improves to £251/ft² when Zervo Village is excluded.*

The map below shows the main study area broken down into distinctive Retail Zones and displays the overall sales area, total estimated *Non-Food* sales and average sales density per area*. Sales density is defined as estimated turnover including VAT divided by estimated selling space in ft².
Retail Zoning

- Retail Zone 1 is Sovereign Centre, which accounts for the largest selling area of 93kft². Sales density in comparison to other locations is perhaps lower than expected, at just £205/ft², although Zervo Village has an adverse affect on this figure, which improves to £251/ft² when this store is excluded. More generally, with the exception of Costa, all stores perform significantly worse than average across FSP’s audited locations, and key anchor stores (now only JD Sports since New Look’s closure) are under-sized compared to average. C&F performs worst here, with a sales density of £136/ft², whilst Personal Goods perform strongest (density of £337/ft²).

- Christchurch Road (West) is represented by Retail Zone 2, with a low selling area of just 8kft². However, sales density is one of the higher results here (£238/ft²). The area is dominated by F&B (58% of tenants) including takeaways, but Household Goods and Leisure Goods operators perform most strongly here.

- Royal Arcade (Retail Zone 3) has the lowest sales area and performs poorly despite its potential as a destination, with a sales density of £161/ft². Household Goods and Leisure Goods dominate the tenant mix, but F&B performs best (sales density of £227/ft²).

- Retail Zone 4 is the central pedestrianised area of Christchurch Road. This area shows the strongest performance, with a sales density of £287/ft². Caterers dominate (39% of tenants), but do not perform best; with a sales density of £358/ft², Household Goods perform most strongly, followed by C&F and Leisure Goods.

- Christchurch Road (East), Retail Zone 5, performs relatively poorly, with a sales density of £173/ft². As with Christchurch Road (West), a high proportion of tenants are classified as F&B (52%) which perform slightly better than average within this Retail Zone (£193/ft²). Household Goods and Leisure Goods operators perform worst here, whilst Personal Goods perform the best.
Retail Zoning

- The remainder of retail space within the study area (beyond Chessel Avenue) is represented by Retail Zone 6. Due to there being a number of specialist retailers in the area, this Retail Zone performs almost as well as Christchurch Road (East) / Retail Zone 2, with an average sales density of £234/ft² placing it within the top 3 Retail Zones. Household Goods (41%) and F&B (33%) dominate within this Retail Zone, with Household Goods performing better than Catering outlets.

- Appendix 6 contains a breakdown of the Zones by selling area, sales, density and the proportion of sales by Merchandise Group and FISH as well as list of retailers within each Zone.

- Boscombe’s vacancy rate (within the study area) is 14% compared to 12.4% nationally, 10.7% within town centres (Source: Local Data Company, 2016) and 8% in similar coastal locations which FSP has audited. Condensing the spatial extent of the shopping area by converting some units to other uses would create a more focussed retail hub centred around the Sovereign Centre and the main drag of The Precinct. The tenant strategy would then be pursuit of differentiation and interest to provide Boscombe with a more specific appeal.

- The volume of Independents within Boscombe should be considered an asset to the destination going forward, but promoting the area in this way will require improvements in quality as the offer in many shops is poor and units appear run-down and under-invested. There is capacity to build the independent offer within Boscombe as these represent 59% of tenants compared to 62% across Similar Locations. This, alongside development of the F&B offer, would hold wide-scale appeal, particularly for older residents and Leisure visitors.

- Boscombe may also benefit from increasing its C&F offer as this accounts for 16% of Non-Food retail as opposed to 19% across Similar Locations (excluding Independents). Appendix 7 contains a breakdown of Boscombe’s Non-Food merchandise mix vs. Similar Locations.
Section 5: Housing Developments
Housing Developments

The table below details housing developments in Boscombe and its surrounding area. The area is receiving significant investment which is largely targeted at families and young professionals. If all listed developments go ahead, then reports in the public domain suggest that between 2016 and 2020 projected housing developments will add a further c840 residents to the local population.

<table>
<thead>
<tr>
<th>Address</th>
<th>Year</th>
<th>Total Units</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Cotton Exchange, Christchurch</td>
<td>2016</td>
<td>39 apartments</td>
<td>The Cotton Exchange is a development of 39 luxury apartments, including rooftop gardens. Redevelopment of 634ft² 1800s Plumbers Department Store. All dwellings are now sold and ready for occupation (later in 2016).</td>
</tr>
<tr>
<td>Road, Christchurch</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>752-778 Christchurch Road, Boscombe</td>
<td>2017</td>
<td>51 flats and 8 retail units</td>
<td>Development by DWP Housing Partnership - demolition and replacement of existing buildings. When completed the flats will be available to over 50s only. 45 of the flats will be 1-bedroom and 8 will be 2 bedroom. Due for completion in 2017.</td>
</tr>
<tr>
<td>Exton Gardens, 70 Knyveton Road,</td>
<td></td>
<td>74 apartments</td>
<td>New development of 74 apartments close to Bournemouth Town Centre, with communal swimming pool and gym. Marketing will commence in 2017.</td>
</tr>
<tr>
<td>Bournemouth</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Palmerston Road, Boscombe</td>
<td></td>
<td>11 houses (2-3 bedrooms)</td>
<td>Planning application submitted by Bournemouth Council for affordable family homes on the Council Car Park, as part of a wider strategy to encourage more families to settle within Boscombe. The proposed developments would create 11 2-3 bed homes, on a shared ownership basis. Offering part-by, part-rent homes is hoped to encourage working families to Boscombe and an opportunity for those on average incomes to step onto the property ladder.</td>
</tr>
<tr>
<td>Victorian Gantry, Royal Arcade</td>
<td></td>
<td>28 apartments</td>
<td>Planning permission has been granted for refurbishment of shopkeepers' flats above Boscombe's 1892 Grade-II listed Royal Arcade, for 28 residential units (1 x 1 -bed flat, 24 x 2-bed maisonettes and 3 x 3-bed maisonettes). Whilst the development is currently stagnant due to a dispute between the leaseholder and the freeholder, a Lottery funding bid is being pursued to complete the development.</td>
</tr>
<tr>
<td>Shelley Manor, Shelley Park</td>
<td></td>
<td>13 apartments</td>
<td>13 spacious 2-3 bedroom apartments, with balconies/terraces and underground parking. The flats are currently on the market for sales.</td>
</tr>
<tr>
<td>Christchurch Road, Bournemouth</td>
<td></td>
<td>15 apartments</td>
<td>Future development opportunity: planning permission has been granted for 15 apartments, awaiting an investor</td>
</tr>
<tr>
<td>Tuckton Close, Southbourne</td>
<td>2016</td>
<td>3 units</td>
<td>Development of 3 luxury 4-bedroom houses and 2 chalets</td>
</tr>
</tbody>
</table>

Source: EGI/FSP
## Housing Developments

<table>
<thead>
<tr>
<th>Address</th>
<th>Year</th>
<th>Total Units</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centenary Way</td>
<td>50 flats and 30 houses (with 22 additional flats if the bus station was redeveloped)</td>
<td>This is currently an access road located behind Sovereign Centre, which leads to the Centre car park. Relevant parties are exploring how to improve the overall environment of this area and create a more welcoming communal space around Sovereign Centre. Option being explored include the feasibility of removing this road and widening Gladstone Road to create a new frontage to the car park, and safer pedestrian access to the Centre.</td>
<td></td>
</tr>
<tr>
<td>Hawkwood Road Car Park</td>
<td>40 flats</td>
<td>This is another site which is located adjacent to Sovereign Centre, and which has been highlighted as a potential location for residential development. The premise of the development would be to provide an improved link between Sovereign Centre and the Precinct, opening up this space to community or commercial use. Flats are likely to be delivered alongside this.</td>
<td></td>
</tr>
<tr>
<td>Old Coal Yard, Ashley Road (employment)</td>
<td></td>
<td>Identification for potential redevelopment of former coal yard on Ashley Road into office/employment usage. However, a private developer is understood to be putting together a planning permission for residential development.</td>
<td></td>
</tr>
</tbody>
</table>

Source: EGI/FSP
Section 6: Boscombe SWOT Analysis
SWOT Analysis

Strengths

- Pedestrianised precinct providing a comfortable shopping experience
- Accessibility – flat shopping area good for pedestrian access
- Existing café culture (capable of further development)
- Sovereign Centre – Potential to attract new retailers at owner’s cost
- Relatively large resident population
- Some new independent retailing providing relief from the ‘value’ offer
- Royal Arcade
- Beach (and consequent increase in summer tourism)
- Current availability of extensive car parking
- Support from Bournemouth Council in respect of regeneration

Weaknesses

- Retailer/shopper perception of deprivation and anti-social behaviour
- Strung out retail offer dilutes available retail spend across a wide range of operators
- Surfeit of small units, many in poor condition and offering little opportunity to provide a credible offer
- Below average household income for area (but just above UK average)
- Very negative Net Promoter Score when FSP completed its 2014 study
- Reported low sales densities generated by retailers
- Lack of large anchor store/s
- Car park signage weak/non-existent
- Poor evening economy
SWOT Analysis

Opportunities

- Return extraneous retailing to residential/commercial (offices) to concentrate available retail spend into fewer operators and raise overall standards
- Work with New River Retail to attract more retailers to the town using FSP data
- Strengthen the local market (and vintage market) offering more reasons for shoppers to visit the town
- Work closely with owners of Royal Arcade to generate a vibrant (eclectic) retail mix
- Attract private investment aimed at securing a cinema/restaurants to kick-start evening economy
- Upgrade precinct appearance which is starting to show signs of degrading
- Work with key retailers to improve store appearance

Threats

- Accelerating deterioration of Boscombe’s retail offer
- Increasing scale of retail exodus following New Look
- Further downgrading of precinct appearance reduces shopper interest
Section 7: Retail Recommendations
Recommendations

FSP can best use the comments of Andreas Booth – Specsavers franchisor interviewed for this report – to reflect its own summary view: ‘Boscombe needs to decide what it wants to become’. FSP’s overall view is that Boscombe needs to be differentiated from other retail areas in Bournemouth and concentrate on/reflect the key themes for which the town is known – value, creativity, independence, perhaps even a touch of ‘edginess’.

This type of independent retailing strength is visible in a number of other locations: some in London such as Brixton, Shoreditch, Camden, Blackheath (evidencing the different positioning that this can take), as well as places such as North Laine in Brighton and the Northern Quarter in Manchester. Whilst the Council does not have the power to create such an evolution it can perhaps take a lead in providing the conditions for such changes to take place. Some of the main themes relevant to defining a future for Boscombe retailing are set out below:

- **Reduce scale of retail offer:** The main recommendation stemming from the analysis contained in the report is, perhaps unsurprisingly, that Boscombe/Pokesdown retailing would benefit from a reduction in the scale of small shop numbers outside of the main shopping area:
  - Agreeing boundaries beyond which such a reduction could take place is inevitably arbitrary but would probably be outside of the Christchurch Road area from St John’s Road in the west to Chessel Avenue in the east
  - Outside of this ‘primary shopping area’ FSP recommends that where possible, over time, residential and commercial (office) uses replace sections of weak retailing/voids

- **Celebrate and encourage independent retailing:** Boscombe needs to differentiate itself from other towns in the Bournemouth area. It already does so to an extent due to its value offer but has the potential to take this further:
Recommendations

- It should be recognised that the likelihood of attracting new major anchor/multiple stores to Boscombe is low. FSP believes the town’s retail future lies in encouraging and promoting eclecticism across F&B and Non-Food categories by independent specialists.

- Try to foster incubation areas where independents can establish the scale and nature of potential in low occupancy areas. The Council cannot do this directly but perhaps can influence co-operative landlords.

- Enlist additional ‘mentors’ for independents. Kate Greenham and Cat McMillan already perform this role to an extent for the Council as does Mike Slaughter and his team at Outset, but perhaps other established managers/owners in Boscombe can assist fledgling retailers to optimise their business and avoid making critical mistakes early in their business cycle.

- Scour the markets for nascent independent retailers to encourage into potential business. Marylebone High St in London did this in the early days of its renaissance.

- At an appropriate time consider creating a map for website and tourist information etc which highlights where all the independent specialists are located in Boscombe. Accompany by PR to spread the message.

Markets: There is a national surge in market popularity, but primarily those positioned at a more aspirational level and accommodating the current street food trend:

- Boscombe has a Thursday/Saturday market in The Precinct which is reported to be well-used, albeit some traders have deserted to the Zervo Flexi Village in the Sovereign Centre. The market is a point of differentiation which needs to be worked at to broaden its uses and participation.
Recommendations

- The Precinct is a prime area for generating vibrancy and activity, can it be treated like a shopping mall space (essentially during summer) and feature more kiosks, exhibitions, food fairs, music, radio etc – all promoted strongly within a programme of events to draw more people to the town? This will require co-ordination and leadership.

- If retail space reduction is planned to take space could antique dealers be re-sited to a specific day in the present market area? If not feasible, perhaps the Royal Arcade can be used for the same purpose. At the very least antique traders in their current Christchurch Road locations could perhaps synchronise opening hours.

- Similarly, the regular Vintage Market is reported to have folded. This reflected Boscombe's character (slightly alternative) and efforts should be made to reinstate it and ensure it is run effectively.

- **Community services:** As town centre voids rose in number during the recession post 2008 many Councils sought to encourage the integration of services such as dentists, doctors’ surgeries, libraries into more central locations. This has the benefit of using space which would otherwise often be an eyesore as well as generating extra pedestrian flow. This has clearly happened in Boscombe with the Regeneration Department’s own office but are there opportunities to develop this further?

- **Sovereign Centre:**

  - New River Retail is clearly working hard at enlisting more retailers in the town’s key location for multiple traders. FSP often works with retail clients helping to use data from its research to recruit target operators and can contact the Centre to investigate whether this will be of interest.
Recommendations

■ Royal Arcade:

- Whilst this is without doubt a very attractive building it is a retail fact that arcades are difficult to make work. They are often on the periphery of main shopping areas, do not form part of a typical retail circuit as they do not lead anywhere and are formidably difficult to asset manage due to high retailer failure rates. To be successful arcades need critical mass (enough content to make the visit worthwhile), a commonality of theme and be professionally run by a person/team with real interest. Few of these requirements appear to be present in the Royal Arcade at present.

- It’s interesting to note that Rosie’s Mediterranean Café and Crusty Bread have established themselves on the highly tertiary Roumelia Lane. It is conceivable that the Arcade should be seeking to establish itself as a specialist destination in a similar way. Possible options include:
  - Food and drink: Speciality/artisan, pop-up operators, health foods, niche products such as smoked fish/meat, fitness supplements.
  - Crafts: Ideally work/sell areas where shoppers can see products being made eg jewellery, ceramics, art gallery.

- Such ideas will not work without the commitment of the present owner to support and encourage operators at the same time as actively managing and curating the offer. This might be a step too far based on observations and anecdotal reports but efforts need to be made to resuscitate the appeal of this fine building.
Conclusion
Conclusion

This report makes clear recommendations on potential routes which could be taken to improve the future of retailing within Boscombe. FSP’s opinion is that the best course of action is to build upon the current value-based appeal, whilst integrating and improving existing independent operators within the retail offer to make this a key selling point for Boscombe as a shopping destination. This would go hand in hand with the town’s reputation as a creative location and would enhance the appeal of visiting Boscombe to a wider spectrum of potential visitors.

Importantly, creating a strong Independent offer would also differentiate the area from its surrounding competing locations, resulting in the development of a strong and highly relevant convenience-based offer for local residents alongside a more eclectic and ‘edgy’ mix of operators which would potentially extend appeal to more affluent residents in the Outer catchment segment.

Whilst this process will require a significant upgrade of the environment more generally to succeed, streamlining the offer in this way is likely to give Boscombe a stronger identity when coupled with a strategic reduction in selling space. Over time, and alongside the wider residential developments planned, upgrades to the area could lead to a change in its perceived positioning by retailers and shoppers alike and yield new opportunities longer-term.

FSP
August 2016
Appendices
Appendix 1: Bespoke Catchment Postal Sectors
## 2014 Catchment Postal Sectors

<table>
<thead>
<tr>
<th>Postcode Sector</th>
<th>Territory</th>
<th>2015 Resident Population</th>
<th>2015 Shopper Population</th>
<th>Shopper Penetration (%)</th>
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<tbody>
<tr>
<td>BH5 1</td>
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<td>353</td>
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</tr>
<tr>
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<thead>
<tr>
<th>Postcode Sector</th>
<th>Territory</th>
<th>2015 Resident Population</th>
<th>2015 Shopper Population</th>
<th>Shopper Penetration (%)</th>
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</thead>
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<td>9%</td>
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<tr>
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<td>589</td>
<td>9%</td>
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<tr>
<td>BH9 2</td>
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<td>824</td>
<td>8%</td>
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<td>353</td>
<td>7%</td>
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<td>5%</td>
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<td>7,138</td>
<td>353</td>
<td>5%</td>
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</tbody>
</table>
Appendix 2: ACORN Definitions
What is ACORN?

What is ACORN:

ACORN is a geodemographic segmentation of the UK’s population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types.

Acorn provides a detailed understanding of the people who interact with your organisation. It helps you learn about their relationship with you.

This knowledge gives you the opportunity to target, acquire and develop profitable customer relationships and improve service delivery.

Who uses ACORN?

A wide range of organisations use ACORN to provide an accurate picture of the needs of their customers and local communities.

ACORN is used to understand consumers’ lifestyle, behaviour and attitudes, together with the needs of neighbourhoods and people’s public service needs. It is used to analyse customers, identify profitable prospects, evaluate local markets and focus on the specific needs of each catchment and neighbourhood.

You can learn more about your business by adding ACORN codes to a customer database. You can also identify prospects who resemble your best customers.

By assessing the ACORN mix of residents of a local neighbourhood you can define the residents’ demand for products and services in any local area – and compare it to any other area in the UK.
What do the ACORN Categories mean?

Category 1: Affluent Achievers

Some of the most financially successful people in the UK. Living in wealthy, high status rural, semi-rural and suburban areas. Middle aged or older people predominate, with many empty nesters and wealthy retired. Living as owner occupiers in large houses, which are usually detached with four or more bedrooms. Second property ownership is very common and incomes are well above average. Very well educated, most are employed in managerial and professional occupations, or business owners. Many can afford to spend freely and have built up savings and investments. Confident with new technology, these people are established at the top of the social ladder. They are healthy, wealthy and confident consumers.

Category 2: Rising Prosperity

Young, well educated, and mostly prosperous people living in major towns and cities. Most are singles or couples, some yet to start a family, others with younger children. Often highly educated professionals moving up the career ladder. Living in converted or modern flats and terraced town houses, some are buying their home, occasionally through some form of shared equity scheme, while others will be renting. Many have good incomes but substantial savings or investments are yet to be built. They are the internet generation, ‘early adopters’ and smart phone users. They have a cosmopolitan outlook and enjoy their urban lifestyle including eating out in restaurants, theatre, cinema and make the most of the culture and nightlife of the big city.

Category 3: Comfortable Communities

This category contains much of middle-of-the-road Britain. All life stages are represented in this category. Many areas have mostly stable families and empty nesters, especially in suburban or semi-rural locations. There are also comfortably off pensioners, living in retirement areas around the coast and countryside as well as younger couples just starting out. Home ownership is common, mostly semi-detached or detached, and of average value for the region. Incomes are average, some will earn more, the younger people a bit less than average. Those better established might have built up a degree of savings or investments. Employment is in a mix of professional and managerial, clerical and skilled occupations. Most people are comfortably off. They may not be very wealthy, but they have few major financial worries.

Category 4: Financially Stretched

Housing is terraced or semi-detached, a mix of lower value owner occupied, rented from the council or housing associations. Fewer traditional married couples than usual and more single parents, single, separated and divorced people than average. Incomes are well below average and the majority of people are in lower paid administrative, clerical, semi-skilled and manual jobs. Unemployment and benefit claimants are above average, and credit cards, investments, pensions and savings are uncommon. Some are likely to have been refused credit and some will be having difficulties with debt. Use of new technology shop online and online shopping is lower than average, although many will use the internet socially.

Category 5: Urban Adversity

This category contains the most deprived areas of the UK. Household incomes are below the national average and benefits claimants are well above the national average. Levels of debt and refused credit is nearly double the national average. Those in work are employed in semi-skilled or unskilled occupations. The housing is a mix of low rise estates, with terraced and semi-detached houses, and purpose built flats, including high rise blocks. Properties tend to be small and some overcrowded. Over half of the housing is rented from the local council or a housing association. There are a large number of single adult households, including many single pensioners, lone parents, separated and divorced people. There are higher levels of health problems in some areas.
Category 1: Affluent Achievers
Group A: Lavish Lifestyles

Features

- Lavish Lifestyles are the most affluent people in the UK
- Professions include premiership footballers, hedge fund managers, entrepreneurs and high status senior management and professionals
- Many are very well-educated individuals, many are company directors or business owners
- Houses are large and typically worth over £1 million, rising to many millions in the South East
- Second property ownership is also common, either abroad or in the UK
- Financially sophisticated, they purchase a wide range of financial products and read the financial pages
- They use the internet for practical research and news-gathering more than for shopping or social activity

Key Retailers

Whistles
Harvey Nichols
Whole Foods Market
Mulberry
Burberry
Jimmy Choo

Spending Behaviour

<table>
<thead>
<tr>
<th>Category</th>
<th>Index GB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing &amp; Footwear</td>
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</tr>
<tr>
<td>Personal Goods</td>
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<tr>
<td>Household Goods</td>
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</tr>
<tr>
<td>Leisure Goods</td>
<td></td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td></td>
</tr>
</tbody>
</table>

Distribution Map

Online Expenditure

FISH Expenditure

11%
Category 1: Affluent Achievers
Group B: Executive Wealth

Features
- Executive Wealth are wealthy families living in larger detached or semi-detached properties
- Located either in the suburbs, the edge of towns or in semi-rural locations
- Lifestage is a mix of families, some empty nesters and better-off retired couples
- Many families own their home but many will still be repaying a mortgage. Second home ownership is relatively common
- Incomes are good, managerial and professional occupations and company directors are common
- They have multiple bank accounts and credit cards and the incomes to spend relatively freely
- Financially secure with a variety of investments, personal pensions and significant levels of savings
- The internet is used frequently for shopping and current affairs
- Modern technology ownership such as tablet PCs and smartphones is common

Key Retailers
- THE WHITE COMPANY
- Phase Eight
- John Lewis
- FIRED EARTH
- COAST
- CREW CLOTHING CO
- BOSS

Spending Behaviour
- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

Online Expenditure
- FISH Expenditure

% UK
- Executive Wealth, 11%
Category 1: Affluent Achievers
Group C: Mature Money

Features
- Mature Money tend to be older empty nesters and retired couples
- Living in larger detached or semi-detached houses or bungalows in rural towns and villages, or in the suburbs of larger towns. Some may have down-sized to live in good quality apartments
- These are high income households, even those who are retired. Employment is typically in managerial and professional roles
- They own their homes outright and have the money to invest in a wide range of financial products and leisure pursuits
- They enjoy gardening, walking, photography, golf, good food and wine and holidays
- They do not generally favour new technology and are unlikely to have a smartphone or tablet PC

Key Retailers
- Waitrose
- LAKE LAND
- John Lewis
- hotter
- M&S

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure
Category 2: Rising Prosperity
Group D: City Sophisticates

Features

- City Sophisticates are affluent younger people living in and, generally owning, expensive flats in major towns and cities. They enjoy the lifestyle that comes with living in larger cities.
- The majority are single people and couples without children.
- Many are graduates - occupations tend to be white collar, including senior managerial and professional.
- While not all are highly paid, incomes are above the national average. Some people will be utilising overdrafts or making minimum credit cards repayment.
- Financially aware, they use online banking, switch accounts, and have multiple cards and accounts.
- A number will have built up significant saving accounts or investments in shares.
- Ownership of smartphones and tablet devices is double the national average.
- Frequent users of the internet for current affairs, shopping and downloading music and films.

Key Retailers

- WHISTLES
- URBAN OUTFITTERS
- ALDO
- ZARA
- REISS
- M&S
- SIMPLY FOOD

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

Online Expenditure

- 7%

FISH Expenditure
Category 2: Rising Prosperity
Group E: Career Climbers

Features

- Career Climbers are younger people, singles, couples and families with young children
- Living in urban locations (frequently London) in flats, apartments and smaller houses, either rented or buying with a mortgage/shared equity scheme
- Overall they have higher qualifications than average and incomes are well above average
- Occupations are commonly white-collar including both managerial and professional roles
- Likely to have loans i.e. student borrowing and mortgage repayments, some have savings, investments and pensions. Disposable income is not very high due to living costs and borrowing
- Confident users of new technology and frequent users of the internet to research purchases, read newspapers, buy and download music
- Ownership of smartphones, media players, tablet PC’s and games consoles is high

Key Retailers

- Costa
- Next
- Superdry
- H&M
- GAP

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure

% UK

Career Climbers, 6%
Category 3: Comfortable Communities
Group F: Countryside Communities

Features

- Countryside Communities live in remote farming areas, smaller villages and housing on the outskirts of smaller towns where population densities are low.
- Housing is typically owner occupied, detached or semi-detached, farms and cottages.
- Agricultural employment is significant and there are also many other skilled occupations and some professional people.
- Overall the mix of people is older than the average.
- Incomes might be lower than the national average, but some families will have built up savings and investments and be in a strong financial position compared to those in urban areas.
- Leisure interests will reflect the rural locations - walking, wildlife, photography, gardening and food.

Key Retailers

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure

Index GB = 100
Category 3: Comfortable Communities
Group G: Successful Suburbs

Features

- Successful Suburbs are home-owning families living comfortably in stable areas in suburban and semi-rural locations that make up much of Middle Britain.
- Housing is three or four bedroom detached and semi-detached of an average value for the locality.
- Families might include young children, teenagers or even young adults, some are empty nesters.
- Incomes are of average levels or above. Many have A level or higher qualifications.
- Employment is in a range of occupations, including middle management and clerical roles, as well as shop work and skilled manual work.
- Most will have some savings and some will have company or private pensions. The more affluent will have good company cars.
- Internet use is occasional rather than heavy although, their phones are more likely to have internet capability than not.

Key Retailers

- Blacks
- OUTFIT
- Robert Dyas
- Sainsbury’s
- M&S

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

- Households Index v Average
  - Group UK average = 100
  - Greater than 500
  - 300 - 500
  - 200 - 300
  - Less than 200
  - Zero households

Clothing & Footwear

- Online Expenditure
  - 7%
- FISH Expenditure
  - Young
  - Assured
  - Family
  - Classic
  - Old
Category 3: Comfortable Communities
Group H: Steady Neighbourhoods

Features

- Steady Neighbourhoods are home-owning families, often middle-aged, living comfortably in suburban and urban locations, forming the bedrock of many towns across Britain.
- Owners of mainly older, lower priced, three bedroom terraced or semi-detached homes.
- Families might include young children, teenagers or young adults. Some are empty nesters.
- GCSE and A level qualifications are typical although some have degrees. Household incomes are around the national average.
- Employment is a range of middle management and clerical or shop work and semi-skilled manual work.
- Interaction with financial services broadly mirrors the national average. Most have some small savings.
- Internet use is not extensive or regular. They are more likely to read a tabloid than a broadsheet.

Key Retailers

- BRANTANO
- DOROTHY PERKINS
- THE BODY SHOP
- Sainsbury’s
- BURTON MENSWEAR
- Argos

Spending Behaviour

<table>
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<tr>
<th>Category</th>
<th>Index GB</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Food &amp; Beverage</td>
<td>80</td>
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Distribution Map

- Households Index v Average
  - Greater than 500
  - 300 - 500
  - 200 - 300
  - Less than 200
  - Zero households

Online Expenditure

- FISH Expenditure
  - Young
  - Assured
  - Family
  - Classic
  - Old

% UK

Steady Neighbourhoods, 8%
Category 3: Comfortable Communities
Group I: Comfortable Seniors

Features

- Comfortable Seniors are communities made up of retired and older empty nester couples.
- Property tends to be two and three bedroom semi-detached houses, bungalows and some smaller purpose-built flats. These will typically be slightly below the average value for the area. The majority will have paid off their mortgage and own their homes outright.
- The working population are in a mix of middle, lower management and supervisory jobs while some of the pensioners might have had more senior roles. Incomes are relatively modest.
- Many will have a reasonable disposable income. They may also have some investments for security in their old age.
- Internet use is sporadic for practical purposes such as email and purchasing travel tickets. New technology is unlikely to attract these people.

Key Retailers

- Robert Dyas
- Sainsbury's
- hotter
- Bonmarché

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

Households Index v Average
Group UK average = 100
- Greater than 500
- 300 - 500
- 200 - 300
- Less than 200
- Zero households

Online Expenditure

- 4%

FISH Expenditure

- Young
- Assured
- Family
- Classic
- Old
Category 3: Comfortable Communities
Group J: Starting Out

Features

- Starting Out are younger couples in their first home, starting a family, and others who are at an early stage of their career.
- Some are still renting but most will be buying their home with a mortgage.
- Junior executive jobs and other white collar or professional occupations are typical. Household incomes tend to be above average. Outgoings are high with their mortgage and an active social life.
- Having saved up a deposit and accruing student debt means housing is usually lower cost. Terraced or smaller semi-detached homes are typical.
- This is the internet generation and they spend more time online than average.
- New technology including smartphones and tablet computers might be popular.

Key Retailers

- OUTFIT
- Dune
- schuh
- TESCO
- COSTA
- OASIS

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

- Households Index v Average
  - Group UK average = 100
  - Greater than 500
  - 300 - 500
  - 200 - 300
  - Less than 200
  - Zero households

Online Expenditure

- 7%

FISH Expenditure

- Young
- Assured
- Family
- Classic
- Old

FSP RETAIL BUSINESS CONSULTANTS
Category 4: Financially Stretched
Group K: Student Life

Features

- Student Life consists of areas dominated by students and young people, often recent graduates.
- At least half of the people are studying. Students will be living in a hall of residence or in flats or shared houses.
- There will be little in the way of incomes other than to fund their time at university. Some will be utilising overdrafts or be building up debts.
- Internet use is likely to be extensive whether for their studies, or leisure purposes. They go online to research their purchases, download music, stream TV or videos and play games.
- Ownership of smartphones tablet and hand-held computers will be well above average.
- Their interests may focus around social and leisure activities. In addition to the broadsheet newspapers, film, computing, educational and style magazines may be their preferred reading matter.

Key Retailers

- Urban Outfitters
- Schuh
- Superdry
- Jack Wills

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

- Households Index v Average
- Group UK average = 100
- Greater than 500
- 300 - 500
- 200 - 300
- Less than 200
- Zero households

Clothing & Footwear

- 11%
Category 4: Financially Stretched
Group L: Modest Means

Features

- Modest Means own or rent smaller, older, inexpensive terraced housing and flats
- The mix of families is likely to include singles, couples with children and single parents. The age profile may tend to be younger than average
- Incomes are likely to be well below the national average. Jobs reflect a mix of educational qualifications that are generally lower than average. There may be average levels of investments and savings, however a few people may be having difficulties keeping up with loan repayments
- Unemployment may well be above average. In addition to Jobseeker’s Allowance the proportion of people claiming other benefits, is likely to be above average
- Shopping tends towards cheaper stores, fast food, burgers, fried chicken and traditional baked goods
- Football, DVD’s, betting, bingo and the lottery are amongst the more common leisure activities

Key Retailers

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure
Category 4: Financially Stretched
Group M: Striving Families

Features
- Striving Families are low income families typically living on traditional low-rise estates. Many rent their homes from the council or housing association, some have bought their houses.
- Housing typically either terraced or semi-detached with two or three bedrooms. Relatively high numbers of children are typical and there may be high numbers of single parents.
- Incomes are well below average and unemployment and benefit claimants are above average. Jobs may reflect the general lack of educational qualifications.
- Many have been refused credit and a few may be having difficulties keeping up with loan repayments.
- With the exception of games consoles and TV’s these people are less likely to purchase the latest technological goods. Shopping tends to focus on cheaper stores and catalogues.
- Visiting the pub, computer games, DVD’s, betting, bingo and the lottery are common leisure activities.

Key Retailers

Spending Behaviour

Distribution Map

Clothing & Footwear

- NEW LOOK
- Shoe Zone
- Matalan
- Poundland
- SportsDirect.com
- TESCO Extra

Online Expenditure

FISH Expenditure

- Young
- Assured
- Family
- Classic
- Old
Category 4: Financially Stretched
Group N: Poorer Pensioners

Features

- Poorer Pensioners are pensioners and older people. The majority are renting social housing but there are a few who own their home or rent privately.
- Some will not have extensive qualifications, because they would have left school before the age of 16.
- Those of working age are in semi-skilled or manual jobs, in shops or administrative roles.
- Household incomes are well below average, benefit claimants are higher than average. The incidence of health issues will be higher than usual.
- They have little requirement for financial services products and most will not have a credit card.
- Angling, bingo, gambling and television may attract these people’s leisure time.
- New technology holds no interest, many will never have used the internet, or have a mobile phone with more than basic functionality.

Key Retailers

- Poundland
- ASDA
- wilko.com
- Bonmarché

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

- Households Index v Average
  - Group UK average = 100
  - Greater than 500
  - 300 - 500
  - 200 - 300
  - Less than 200
  - Zero households

Online Expenditure

- FISH Expenditure
  - Young
  - Assured
  - Family
  - Classic
  - Old
Category 5: Urban Adversity
Group O: Young Hardship

Features

- Young Hardship are mostly younger people. Owning or renting small, cheap terraced houses or flats.
- Single people or single parent residences are most common, although there are some couples and families with young children. In some cases people are from an East European background.
- Educational qualifications tend to be lower than average and much of the employment is in junior office roles and semi-skilled or manual occupations.
- There are pockets of deprivation. Incomes range from moderate to low and unemployment is higher than the average, while benefit claimants are up to double the national average in some places.
- There are some households with high levels of debt. Some will have been refused credit, most are less likely to use a credit card. A number will difficulty making loan repayments.
- Some will own smartphones, although these are less likely to be less expensive than an iPhone.

Key Retailers

- BLUE INC
- Superdrug
- SPORTS DIRECT.com
- DEICHMANN

Spending Behaviour

- Clothing & Footwear
- Personal Goods
- Household Goods
- Leisure Goods
- Food & Beverage

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure

Households Index v Average
Group UK average = 100
- Greater than 500
- 300 - 500
- 200 - 300
- Less than 200
- Zero households

Online spend

Young Assured Family Classic Old
Category 5: Urban Adversity
Group P: Struggling Estates

Features

- Struggling Estates are low income families living on traditional urban estates, typically renting low cost council property or having bought under right to buy.
- Flats and terraced houses are most common although there may also be some semi-detached estates. Overcrowding is often found among families.
- Proportions of children are high and single parent households are high. Childless couples and pensioners are relatively rare. Some are minority ethnic groups.
- Jobs reflect the educational qualifications and tend to be in factories, shops or other manual occupations.
- Incomes are low and benefit claimants high. Money is tight and refused credit and debt common.
- Shopping tends to focus on cheaper stores, fast food outlets and inexpensive food.

Key Retailers

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure
Category 5: Urban Adversity
Group Q: Difficult Circumstances

Features

- Difficult Circumstances are relatively deprived neighbourhoods consisting of high proportion of younger people. Single parents are common.
- Housing is council or housing association flats and some socially rented terraced housing. A number are high rise blocks.
- This Group has the highest levels of benefit claimants and levels of long term unemployment.
- Qualifications are low, those in work are likely to be employed in routine or semi-skilled manual jobs.
- Credit cards and savings are rare. Some will have loans but struggle to repay them.
- Health problems are higher than usual, including asthma and diabetes.
- Leisure interests include computer games, football, gambling, bingo and television. The tabloids are favoured reading.

Key Retailers

Spending Behaviour

Distribution Map

Clothing & Footwear

Online Expenditure

FISH Expenditure
Appendix 3: ACORN Group Profile
ACORN Group Profile – Residents vs. Shoppers

The adjacent graph shows the ACORN profile of Boscombe’s shoppers (survey respondents) indexed against catchment residents, as in the 2014 report.

- Boscombe shoppers are less affluent in profile than residents: at Group level Executive Wealth and Mature Money are under-represented as shoppers, as are a majority of Groups within the Comfortable Communities ACORN Category.

- In contrast, more deprived Groups, notably Young Hardship, Student Life, Modest Means and Difficult Circumstances are over-represented as shoppers. This indicates that Boscombe’s current retail offer holds more appeal for less affluent, local residents.

Source: FSP/CACI
Appendix 4: Full Study Area
Boscombe: Full Study Area

The full study area covers the central area of Boscombe; from Koh Thai Tapas on the western edge of The Crescent, along Christchurch Road and down Seabourne Road, stopping at Fisherman’s Walk.
Appendix 5: FISH Definitions
Introduction

Shopping Centres, Outlet Centres and increasingly Retail Parks rely upon an appropriate mix of fashion retailers to attract, engage and delight shoppers.

Age and Image self perceptions underpin fashion purchasing decisions and Fashion retailers tend to be positioned to serve specific market niches.

- **Age perception** – expressed as the consumer’s own ‘thinking age’: i.e. how young or old do I feel?
- **Image perception** – what image does the consumer wish to convey about themselves through the merchandise and the brand label: i.e. stylish or safe and sensible?

Consumer segmentations tend to standardise these ‘attitudes’

FISH is FSP’s bespoke method of defining customer segmentation.

Over a decade FSP has devised and refined FISH to uniquely classify occupiers as well as consumers.

FISH based retail mix strategies:

- **Focus** upon shopper needs not benchmarks
- **Take account** of local capacity, market share gaps and occupier performance
- **Allow for** consumers’ flexible purchasing activity e.g. *Assured* at work, *Fashionable* at play
- **Give precise** recommendations of target retailers
- **Describe the opportunity** in the same way occupiers see their market
- **Directly match** demand to occupiers
Age Perception

Fashion purchasing behaviour is largely determined by consumers’ self perception of their own ‘thinking age’ e.g. “How young or old do I feel?”, and “What age-related values do I seek to project?”

- **Young** – Peer pressure to conform is strong and fashion is a powerful identifying statement

- **Assured** – Young but no longer immature, or led by peer group pressure. They are able to make up their own minds, are sophisticated in their choices but do not adopt the attitudes, lifestyles or values typical of older self-perception Groups

- **Family** – Dominated by the financial considerations of running the home and caring for the family, therefore precedence comes before self-indulgence. Members can, and often do, ‘migrate’ temporarily to the Assured or Classic segments when spending on discretionary or ‘special occasion’ purchases however, this depends on how much is available after essential family spending

- **Classic** – Typically, though not universally, Post-Family and includes ‘Empty-Nesters’. In self-perception terms members have many similarities with Assured, differing only in possessing less self-confidence about the ‘rightness’ of purchase decisions, often expressed in terms such as ‘it’s a bit young for me’

- **Old** – No longer want to make any positive statements about themselves through their purchases. Can typically be summarised as, ‘given up’
Image Perception

There are four key image perceptions consumers hold about merchandise:

- **Fashionable** – Attitudes are concerned with purchases which demonstrate the individual's fashionability – being 'up to the minute'. Adherence to peer group dress codes and other tokens of group identity are of overriding importance.

- **Individual** – Purchased which demonstrate enough 'savoir faire' to distinguish between transitory fashion and taste. The consumer knows what suits his/her lifestyle and is able to make up his/her own mind.

  It is important that the purchase should not be recognisable as being from a particular shop while branded goods must fulfil a clearly defined need. Style, individuality and exclusivity are important.

- **Safe** – 'Value for money' for merchandise with “good enough” performance. These include many mass-market branded products, which do not make distinctive claims for performance, and goods recommended in “Which?” magazine.

  This is a particularly important area for those whose self perception is *Assured, Family* or *Classic* and who see themselves as having less discretionary spending and who play safe in their purchase decisions.

- **Homely** – These are purchases where the requirement is for no projection of particular values at all and items are bought purely for replacement. Price is important for goods whose main attribute is ‘utility’.
## Example Retailers

<table>
<thead>
<tr>
<th>Segment</th>
<th>Characteristics</th>
<th>Retailers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fashionable – Demonstrates fashionability</td>
<td></td>
<td><strong>TOPSHOP</strong></td>
</tr>
<tr>
<td>Individual – Demonstrates taste beyond transitory fashion</td>
<td></td>
<td><strong>Desigual</strong></td>
</tr>
<tr>
<td>Safe – ‘value for money’ merchandise with good enough performance</td>
<td></td>
<td><strong>Jack Wills</strong></td>
</tr>
<tr>
<td>Homely – Items are bought purely for replacement. Price is important for goods whose main attribute is utility</td>
<td></td>
<td><strong>Emporio Armani</strong></td>
</tr>
<tr>
<td>Young – Peer pressure to conform is strong and fashion is a powerful identifying statement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assured – Able to make up own mind and sophisticated in choice</td>
<td></td>
<td><strong>Abercrombie &amp; Fitch</strong></td>
</tr>
<tr>
<td>Family – Dominated by the financial considerations of running the home and caring for the family</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classic – Typically Post-Family. Many similarities with Assured but less self confidence about the ‘rightness’ of purchase decisions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Old – ‘Given up’. Not seeking to make a statement about themselves through their purchases</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Retail Zoning

The chart shows the Retail Zones by selling area, sales, density and the proportion of sales by Merchandise Group and FISH*.

<table>
<thead>
<tr>
<th>Merchandise Group</th>
<th>Sovereign Centre</th>
<th>Christchurch Road (West)</th>
<th>Royal Arcade</th>
<th>Main Pedestrianised Area (Christchurch Road)</th>
<th>Christchurch Road (East)</th>
<th>Remainder of Study Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selling Area</td>
<td>93kft²</td>
<td>8kft²</td>
<td>5kft²</td>
<td>57kft²</td>
<td>18kft²</td>
<td>26kft²</td>
</tr>
<tr>
<td>Estimated Sales</td>
<td>£19m</td>
<td>£2m</td>
<td>£1m</td>
<td>£16m</td>
<td>£3m</td>
<td>£6m</td>
</tr>
<tr>
<td>Sales Density</td>
<td>£205ft²</td>
<td>£238ft²</td>
<td>£156ft²</td>
<td>£287ft²</td>
<td>£173ft²</td>
<td>£234ft²</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Merchandise Group</th>
<th>C&amp;F</th>
<th>Personal</th>
<th>Household</th>
<th>Leisure</th>
<th>F&amp;B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young</td>
<td>8%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Assured</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Family</td>
<td>92%</td>
<td>0%</td>
<td>0%</td>
<td>94%</td>
<td>0%</td>
</tr>
<tr>
<td>Classic</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>6%</td>
<td>0%</td>
</tr>
<tr>
<td>Old</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Please note analysis excludes Grocery, Independents and Vacant units

Source: FSP
## Retail Zone 1: Sovereign Centre

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Street</th>
<th>Primary Merchandise Group</th>
<th>Primary C&amp;F FISH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian Angel</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>BB's Coffee and Muffins</td>
<td>Sovereign Centre</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Boots The Chemist</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>BrightHouse</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>CeX</td>
<td>Sovereign Centre</td>
<td>Leisure</td>
<td></td>
</tr>
<tr>
<td>Chorley-Burdett</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Costa</td>
<td>Sovereign Centre</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>EE (Everything Everywhere)</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>F Hinds</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
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<tr>
<td>Fragrance Shop, The</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>Game</td>
<td>Sovereign Centre</td>
<td>Leisure</td>
<td></td>
</tr>
<tr>
<td>Garden Café</td>
<td>Sovereign Centre</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Happy Buddha</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>JD</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>YI</td>
</tr>
<tr>
<td>Jemini Jewellers</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>Meridian Furnishers</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Mix ‘n’ Match</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>New Look (closed post audit)</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>YF</td>
</tr>
<tr>
<td>Peacocks</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>FS</td>
</tr>
<tr>
<td>Pep &amp; Co</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>FS</td>
</tr>
<tr>
<td>Poundland</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Roman</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>FS</td>
</tr>
<tr>
<td>Savers</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>SportsDirect.com</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>FS</td>
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<td>Time Check</td>
<td>Sovereign Centre</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>Top Gift</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Verb</td>
<td>Sovereign Centre</td>
<td>Clothing and footwear</td>
<td>YS</td>
</tr>
<tr>
<td>Warren James</td>
<td>Sovereign Centre</td>
<td>Personal</td>
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<tr>
<td>Wilko</td>
<td>Sovereign Centre</td>
<td>LSU</td>
<td>FS</td>
</tr>
<tr>
<td>Works, The</td>
<td>Sovereign Centre</td>
<td>Leisure</td>
<td></td>
</tr>
<tr>
<td>Zervo Village</td>
<td>Sovereign Centre</td>
<td>LSU</td>
<td></td>
</tr>
</tbody>
</table>

Source: FSP
## Retail Zone 2: Christchurch Road (West)

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Street</th>
<th>Primary Merchandise Group</th>
<th>Primary C&amp;F FISH</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Fried Chicken</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Casa Carlos</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Cash Converters</td>
<td>Christchurch Road</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Eastern Eye, The</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Efes</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Flowers, Gifts</td>
<td>Palmerston Road</td>
<td>Leisure</td>
<td></td>
</tr>
<tr>
<td>H G Arts</td>
<td>End of Sea Road</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Hemporium</td>
<td>End of Sea Road</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Koh Thai Tapas</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Magic Kitchen</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Merryweathers</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Pc &amp; Laptop Serv</td>
<td>Christchurch Road</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Pizzeria via Roma</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Richer Sounds</td>
<td>Christchurch Road</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Rosie's Café</td>
<td>Roumelia Lane</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Santa Cruz</td>
<td>End of Sea Road</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Vapour</td>
<td>End of Sea Road</td>
<td>Personal</td>
<td></td>
</tr>
<tr>
<td>Whistons</td>
<td>End of Sea Road</td>
<td>Clothing and footwear</td>
<td>FS</td>
</tr>
<tr>
<td>XXL</td>
<td>Christchurch Road</td>
<td>Catering</td>
<td></td>
</tr>
</tbody>
</table>
## Retail Zone 3: Royal Arcade

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Street</th>
<th>Primary Merchandise Group</th>
<th>Primary C&amp;F FISH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ascension Inspiration</td>
<td>Sovereign Centre</td>
<td>Household</td>
<td></td>
</tr>
<tr>
<td>Café Point</td>
<td>Sovereign Centre</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Caffe Nero</td>
<td>Sovereign Centre</td>
<td>Catering</td>
<td></td>
</tr>
<tr>
<td>Claire's Collectables</td>
<td>Sovereign Centre</td>
<td>Leisure</td>
<td></td>
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<tr>
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<td>Rose Road Records</td>
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Source: FSP
## Retail Zone 4: Christchurch Road (Pedestrianised)

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<th>Primary C&amp;F FISH</th>
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<td>Catering</td>
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<td>Bag Shop</td>
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<td>Bonmarche</td>
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<td>Cash Generator</td>
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<td>Green Tara Café</td>
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<td>Greggs</td>
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<td>Primark</td>
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<td>Vape Shop,The</td>
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<td>WH Smith Retail</td>
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Source: FSP
## Retail Zone 5: Christchurch Road (East)

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<td>Honey</td>
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<td>Indian Paradise</td>
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Source: FSP
### Retail Zone 6: Remainder of Study Area (1)

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<td>Baby Moos</td>
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<td>Clothing and footwear</td>
<td>FI</td>
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<td>Balti House, The</td>
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<td>Big</td>
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<td>Boscombe Collectables</td>
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<td>Boscombe News</td>
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<td>Bourne &amp; Co Antiques</td>
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<td>Bunitas</td>
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<td>Chameleon</td>
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<td>Cinnamon Corner</td>
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<td>Classic Drums of Bournemouth</td>
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<td>Cobwebs</td>
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<td>Coffee House, The</td>
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<td>Geo. A. Payne &amp; Son</td>
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# Retail Zone 6: Remainder of Study Area (2)

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<td>Grey’s Antiques</td>
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<td>Ivy Gate, The</td>
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<td>Joy Express</td>
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<td>Kwik Fit</td>
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<td>Libra Antiques</td>
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<td>Lionel Geneen</td>
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<td>Pizza Hut Delivery</td>
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<td>Pokesdown Antique Center, The</td>
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<td>Robin’s Antiques</td>
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<td>Roses &amp; Garters</td>
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</table>

Source: FSP
Appendix 7: Merchandise Mix
Merchandise *Group Mix vs. Similar Locations*

This chart below shows Boscombe’s *Non-Food* merchandise mix compared to the average merchandise profile at Similar Locations.

- Boscombe’s tenant mix contains a lower proportion of *Services, C&F and Leisure Goods*, suggesting potential to increase the offer in these Merchandise *Groups*.

*Please note analysis excludes Grocery, Independents and Vacant units

---

Source: FSP/Retail Locations
Merchandise Group Mix vs. Similar Locations

This chart below provides a greater level of detail on the previous slide; showing Boscombe’s Non-Food tenant mix compared to the mix at all of its Similar Locations.

Source: FSP/Retail Locations

FSP RETAIL BUSINESS CONSULTANTS