RECAP

The Retail Capacity forecasting Model

Project:	**Worthing Retail Study Update**	Number:	10752P00
Client:	Worthing Borough Council		
Date of Latest Revision:	19-Apr-10	File:	Worthing RECAP Model 2010

Retail Locations Modelled:

- Worthing Town Centre
- District and Medium Scale Local Centres in Worthing
- Non-central Stores in Worthing

Scenarios Modelled:

1	Baseline - Market Shares based on the Household Interview Survey remain unchanged.
2	Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Notes:

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Description of Zones	Base Year	Forecasting Years			
		2010	2016	2021	2026	
1	Chichester Urban	29,385	32,568	35,221	37,873	
2	Chichester District South	52,708	54,948	56,815	58,681	
3	Chichester District North	45,267	46,878	48,221	49,563	
4	Arun District West	73,571	77,248	80,312	83,376	
5	Arun District East	70,303	76,520	81,701	86,882	
6	Worthing District*	108,184	117,648	124,201	130,755	
7	Eastern Outer	516,700	540,138	559,670	579,201	
TOTAL		896,118	945,948	986,139	1,026,332	

Sources:

Pitney Bowes MapInfo Limited 'Anysite Report' for the catchment area (March 2010).
*Allowance has been made for additional housing of approx 200 dwellings per annum for Worthing (Zone 6) in accordance with the South East Plan & which are not taken account of specific account of in the Anysite Report. SEP (May 2009) provides for 4,000 net additional dwellings in Worthing between 2006-2026, equating to 200 dwellings per annum.

Notes:

The description of zones in Table 1 utilise those included in DTZ's 2005 report. For a full breakdown of the individual postcode sectors in each of these survey zones, see the Anysite Report in Appendix 2 of the Worthing Retail Study Update.

Table: 2

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2008	Price Basis (Year):	2008
Including Special Forms of Trading:			
Convenience Goods (£):	2,006	Comparison Goods (£):	3,168

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	-0.80 %pa 2008 to 2010	0.60 % pa 2008 to 2016	0.80 % pa 2008 to 2021	
	0.80 %pa 2008 to 2026			
Comparison Goods:	(2.7) %pa 2008 to 2010	2.4 %pa 2008 to 2016	3.1 %pa 2008 to 2021	
	3.3 %pa 2008 to 2026			

PER CAPITA EXPENDITURE IN	Convenience Goods (£)					Comparison Goods (£)				
	2010	2016	2021	2026		2010	2016	2021	2026	
(Including SFT)	1,974.03	2,104.33	2,224.94	2,315.37		2,999.24	3,829.88	4,711.38	5,683.17	
Deduction for SFT (%)	4.3	5.5	6.0	7.0		10.0	15.0	16.0	17.0	
Excluding SFT	**1,889.15**	**1,988.60**	**2,091.44**	**2,153.29**		**2,699.31**	**3,255.40**	**3,957.56**	**4,717.03**	

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2008

	Clothing & footwear	Furniture, floor coverings & Hh textiles	Household appliances	Audio-visual equipment	DIY goods & hardware	Other Comparison Goods	Total Comparison Goods
Including SFT (£)	718	414	134	377	351	1,174	3,168

Per Capita Comparison Goods Expenditure in 2010

Including SFT	679.75	391.95	126.86	356.92	332.30	1,111.46	2,999.24
Deduction for SFT (%)	7.5	4.0	10.0	20.0	5.0	12.0	10.0
Excluding SFT (£)	628.77	376.27	114.18	285.53	315.69	978.08	2,699.31

Sources:

Pitney Bowes 'Anysite Report' for the catchment area. Pitney Bowes/Oxford Economics Retail Expenditure Guide 2009/10.
DTZ estimates for SFT based on 'UK e-retail 2009', Verdict Research Limited.

Notes:

Growth projections apply the Oxford Economics forecasts up to 2019, followed by the ultra long term trend of 3.9%pa for the period 2019 to 2026.

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	55,513	64,765	73,662	81,552	79,319	106,022	139,387	178,648
2	99,573	109,269	118,825	126,358	142,275	178,877	224,847	276,802
3	85,516	93,221	100,850	106,724	122,190	152,606	190,835	233,790
4	138,987	153,615	167,968	179,534	198,591	251,473	317,840	393,289
5	132,813	152,167	170,873	187,082	189,770	249,103	323,336	409,824
6	204,376	233,954	259,759	281,554	292,023	382,991	491,532	616,776
7	976,123	1,074,116	1,170,516	1,247,191	1,394,735	1,758,363	2,214,924	2,732,113
TOTALS	1,692,900	1,881,109	2,062,453	2,209,994	2,418,904	3,079,435	3,902,702	4,841,242

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2010

Catchment Zone	Clothing & footwear (£000)	Furniture, floor coverings & Hh textiles (£000)	Household appliances (£000)	Audio-visual equipment (£000)	DIY goods & hardware (£000)	Other Comparison Goods (£000)
1	18,476	11,057	3,355	8,390	9,276	28,741
2	33,141	19,832	6,018	15,050	16,639	51,553
3	28,463	17,033	5,168	12,925	14,290	44,275
4	46,259	27,682	8,400	21,007	23,225	71,959
5	44,204	26,453	8,027	20,074	22,194	68,762
6	68,023	40,706	12,352	30,890	34,152	105,813
7	324,885	194,418	58,994	147,535	163,115	505,376
TOTALS	563,452	337,181	102,315	255,872	282,893	876,479

Sources: RECAP Tables 1 and 2

Scenario 1

Worthing Town Centre

Table: 5

CONVENIENCE GOODS MARKET SHARES IN 2010

2010 Allocations to
Worthing Town Centre
Indicated by Household Interview Survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q3a	Q3b	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	1.0	0.0	0.8
6	6.0	17.0	8.8
7	0.0	1.0	0.3

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: 6

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2010

2010 Allocations to
Worthing Town Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture, floor coverings & Hh textiles	Household appliances	Audio-visual equipment	DIY goods & hardware	Other comparison goods	**WEIGHTED AVERAGE**
	Q6	Q10	Q11	Q12	Q13	Q8	
Zones	Expenditure weighting						
	629	376	114	286	316	978	2,699
	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	3.0	0.0	0.0	0.0	0.0	1.0	1.1
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	3.0	0.0	0.0	0.0	0.0	4.0	2.1
4	6.0	0.0	0.0	2.0	3.0	5.0	3.8
5	39.0	5.0	0.0	0.0	0.0	46.0	26.5
6	76.0	0.0	6.0	14.0	4.0	77.0	47.8
7	14.0	0.0	0.0	0.0	0.0	14.0	8.3

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: 7

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Worthing Town Centre**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 270 % of survey indicated figures
Comparison Goods: 90 % of survey indicated figures

Catchment Zone	CONVENIENCE GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)	COMPARISON GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)
	90							
1	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2	2	2	2
4	0	0	0	0	3	3	3	3
5	2	2	2	2	24	24	24	24
6	24	24	24	24	43	43	43	43
7	1	1	1	1	8	8	8	8

Sources: RECAP Model.
DTZ for market share corrections.

Table: 8

COMPARISON GOODS SALES BY GOODS TYPE IN 2010

Catchment Zones	Clothing & footwear (£000)	Furniture, floor coverings & Hh textiles (£000)	Household appliances (£000)	Audio-visual equipment (£000)	DIY goods & hardware (£000)	Other comparison goods (£000)
	2010 Sales in **Worthing Town Centre** By Comparison Goods Type.					
1	499	0	0	0	0	259
2	0	0	0	0	0	0
3	768	0	0	0	0	1,594
4	2,498	0	0	378	627	3,238
5	15,516	1,190	0	0	0	28,468
6	46,528	0	667	3,892	1,229	73,328
7	40,936	0	0	0	0	63,677
TOTALS	106,744	1,190	667	4,270	1,857	170,564
MARKET SHARES	19%	0%	1%	2%	1%	19%

Sources: RECAP Model.

Table: 9

FORECAST RETAIL SALES

Scenario: 1 Location: **Worthing Town Centre**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Catchment zone	CONVENIENCE GOODS 2010 (£000)	CONVENIENCE GOODS 2016 (£000)	CONVENIENCE GOODS 2021 (£000)	CONVENIENCE GOODS 2026 (£000)	COMPARISON GOODS 2010 (£000)	COMPARISON GOODS 2016 (£000)	COMPARISON GOODS 2021 (£000)	COMPARISON GOODS 2026 (£000)
	RETAIL SALES BY CATCHMENT ZONE							
1	0	0	0	0	793	1,060	1,394	1,786
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2,444	3,052	3,817	4,676
4	0	0	0	0	5,958	7,544	9,535	11,799
5	2,656	3,043	3,417	3,742	45,545	59,785	77,601	98,358
6	49,050	56,149	62,342	67,573	125,570	164,686	211,359	265,214
7	9,761	10,741	11,705	12,472	111,579	140,669	177,194	218,569
TOTALS	61,468	69,934	77,465	83,787	291,888	376,796	480,899	600,401

Sources: RECAP Model.

Table: **10**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2010

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Waitrose, High Street	2,148	86	1,847	13,137	24,268
Somerfield, The Guildborne Centre	1,050	80	840	8,513	7,151
Lidl, North Street	745	78	581	4,728	2,747
Marks & Spencer, Montague Street	836	93	777	12,710	9,882
Iceland, Pavillion Parade	515	92	474	6,436	3,049
Co-op, Plaza Parade	377	82	309	7,156	2,212
Other Worthing Town Centre	3,128	95	2,972	4,500	13,372
ALL STORES	8,799		7,800	8,036	62,682

Sources: IGD, Goad, DTZ, Verdict Research.

Table: **11**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-	#DIV/0!	-

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 12

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Worthing Town Centre**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	61,468	69,934	77,465	83,787		291,888	376,796	480,899	600,401	
Plus visitors' spending (%)	2.0	2.0	2.0	2.0		5.0	5.0	5.0	5.0	
Total spending (£000)	62,697	71,332	79,014	85,462		306,482	395,636	504,944	630,421	
Existing shop floorspace (sq m net)	7,800	7,800	7,800	7,800		55,683	55,683	55,683	55,683	
Sales per sq m net (£)	8,038	8,036	8,036	8,036		5,504	5,929	6,388	6,881	
Sales from extg flrspce (£000)	62,697	62,682	62,682	62,682		306,482	330,169	355,685	383,174	
Available spending to support new shops (£000)	0	8,651	16,332	22,781		0	65,467	149,259	247,247	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	8,651	16,332	22,781		0	65,467	149,259	247,247	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		5,000	5,386	5,803	6,251	
Capacity for new shop flrspc (sq m net)	**0**	**721**	**1,361**	**1,898**		**0**	**12,154**	**25,722**	**39,552**	

Market Share of Catchment Area Expenditure	3.6%	3.7%	3.8%	3.8%		12.1%	12.2%	12.3%	12.4%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Experian Goad Survey

Scenario 1

District and Medium Scale Local Centres in Worthing

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2010

2010 Allocations to District and Medium Scale Local Centres in Worthing Indicated by Household Interview Survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q3a	Q3b	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	1.5	8.0	3.1
7	0.0	1.7	0.4

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2010

	2010 Allocations to District and Medium Scale Local Centres in Worthing Indicated by Household Interview Survey						
	Clothing & footwear	Furniture, floor coverings & Hh textiles	Household appliances	Audio-visual equipment	DIY goods & hardware	Other comparison goods	**WEIGHTED AVERAGE**
	Q6	Q10	Q11	Q12	Q13	Q8	
Zones	Expenditure weighting						
	629	376	114	286	316	978	2,699
	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	13.0	12.0	12.0	12.0	12.0	13.0	12.6
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Notes: The Household Interview Survey did not register any market shares for the District Centres, so DTZ estimates for zone 6 (Worthing).

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **District and Medium Scale Local Centres in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Market shares correction factors:
Convenience Goods: 350 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	11	11	11	11	13	13	13	13
7	1	1	1	1	0	0	0	0

Sources: RECAP Model.
DTZ for market share corrections.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2010

Catchment Zones	2010 Sales in **District and Medium Scale Local Centres in Worthing** By Comparison Goods Type. Clothing & footwear (£000)	Furniture, floor coverings & Hh textiles (£000)	Household appliances (£000)	Audio-visual equipment (£000)	DIY goods & hardware (£000)	Other comparison goods (£000)
1	0	0	0	0	0	0
2	0	0	0	0	0	0
3	0	0	0	0	0	0
4	0	0	0	0	0	0
5	0	0	0	0	0	0
6	8,843	4,885	1,482	3,707	4,098	13,756
7	0	0	0	0	0	0
TOTALS	8,843	4,885	1,482	3,707	4,098	13,756
MARKET SHARES	2%	1%	1%	1%	1%	2%

Sources: RECAP Model.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **District and Medium Scale Local Centres in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE: CONVENIENCE GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	22,481	25,735	28,574	30,971	37,963	49,789	63,899	80,181
7	9,761	10,741	11,705	12,472	0	0	0	0
TOTALS	32,243	36,476	40,279	43,443	37,963	49,789	63,899	80,181

Sources: RECAP Model.

Table: 18

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2010

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Alldays, 1-2 Brooklyn Chambers, Goring Road	192	90	173	4,500	778
Co-op Supermarket, 11-15 Goring Road	334	82	274	7,156	1,960
Iceland, 12 Wallace Parade	464	92	427	6,436	2,747
Other shops & stores in Goring Road	322	95	306	4,500	1,377
Co-op Supermarket (formerly Somerfield), Cricketers Parade, Broadwater	299	82	245	7,156	1,755
Tesco Express, 2 Broadwater Street West	325	90	293	14,330	4,192
Other shops & stores in Broadwater Road	378	95	359	4,500	1,616
Other convenience shops and stores in District and Medium Scale Local Centres in Worthing	4,353	95	4,135	4,500	18,610
ALL STORES	6,667		6,212	5,318	33,033

Sources: Worthing BC surveys, IGD, Goad, DTZ, Verdict Research.
Notes:

Table: 19

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Lidl Food Store at The Causeway, Worthing *	940	78	733	4,728	3,467
ALL STORES	940		733	4,728	3,467

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Notes: In strict PPS4 terms, this store is located on the edge of a defined centre (The Strand).

Table: **20**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **District and Medium Scale Local Centres in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	32,243	36,476	40,279	43,443		37,963	49,789	63,899	80,181	
Plus visitors' spending (%)										
Total spending (£000)	32,243	36,476	40,279	43,443		37,963	49,789	63,899	80,181	
Existing shop floorspace (sq m net)	6,212	6,212	6,212	6,212		11,083	11,083	11,083	11,083	
Sales per sq m net (£)	5,191	5,318	5,318	5,318		3,425	3,690	3,975	4,283	
Sales from extg flrspce (£000)	32,243	33,033	33,033	33,033		37,963	40,897	44,058	47,462	
Available spending to support new shops (£000)	0	3,443	7,246	10,410		0	8,892	19,842	32,718	
Less sales capacity of committed new floorspace (£000)	3,467	3,467	3,467	3,467		0	0	0	0	
Net available spending for new shops (£000)	-3,467	-23	3,779	6,943		0	8,892	19,842	32,718	
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000		4,000	4,309	4,642	5,001	
Capacity for new shop flrspc (sq m net)	**-347**	**-2**	**378**	**694**		**0**	**2,064**	**4,274**	**6,542**	

Market Share of Catchment Area Expenditure	1.9%	1.9%	2.0%	2.0%		1.6%	1.6%	1.6%	1.7%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Experian Goad Survey

Scenario 1

Non-central Stores in Worthing

Table: 21

CONVENIENCE GOODS MARKET SHARES IN 2010

2010 Allocations to
Non-central Stores in Worthing
Indicated by Household Interview Survey

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q3a	Q3b	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	1.0	0.0	0.8
5	0.0	0.0	0.0
6	72.0	50.0	66.5
7	2.7	0.0	2.0

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: 22

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2010

2010 Allocations to
Non-central Stores in Worthing
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture, floor coverings & Hh textiles	Household appliances	Audio-visual equipment	DIY goods & hardware	Other Comparison Goods	WEIGHTED AVERAGE
	Q6	Q10	Q11	Q12	Q13	Q8	
	Expenditure weighting						
	629	376	114	286	316	978	2,699
	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	1.0	0.0	0.0	0.1
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	1.0	1.0	0.0	0.2
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	8.0	29.0	24.0	25.0	0.0	7.8
6	0.0	60.0	72.0	73.0	81.0	0.0	28.6
7	0.0	13.0	18.0	15.0	12.0	0.0	5.6

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **23**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central Stores in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 74 % of survey indicated figures
Comparison Goods: 40 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	1	1	1	1	0	0	0	0
5	0	0	0	0	3	3	3	3
6	49	49	49	49	11	11	11	11
7	1	1	1	1	2	2	2	2

Sources: RECAP Model.
DTZ for market share corrections.

Table: **24**

COMPARISON GOODS SALES BY GOODS TYPE IN 2010

Catchment Zones	2010 Sales in **Non-central Stores in Worthing** By Comparison Goods Type. Clothing & footwear (£000)	Furniture, floor coverings & Hh textiles (£000)	Household appliances (£000)	Audio-visual equipment (£000)	DIY goods & hardware (£000)	Other Comparison Goods (£000)
1	0	0	0	34	0	0
2	0	0	0	0	0	0
3	0	0	0	52	57	0
4	0	0	0	0	0	0
5	0	846	931	1,927	2,219	0
6	0	9,769	3,557	9,020	11,065	0
7	0	10,110	4,248	8,852	7,830	0
TOTALS	0	20,726	8,736	19,884	21,171	0
MARKET SHARES	0%	6%	9%	8%	7%	0%

Sources: RECAP Model.

Table: **25**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central Stores in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	1,390	1,536	1,680	1,795	0	0	0	0
5	0	0	0	0	5,693	7,473	9,700	12,295
6	100,144	114,638	127,282	137,961	32,122	42,129	54,069	67,845
7	9,761	10,741	11,705	12,472	27,895	35,167	44,298	54,642
TOTALS	111,295	126,915	140,667	152,229	65,710	84,769	108,067	134,782

Sources: RECAP Model.

Table: **26**

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2010

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's, Lyons Farm Retail Park	2,840	73	2,073	10,756	22,299
Tesco (1), New Road	3,340	64	2,138	14,330	30,632
Morrisons, New Road (formerly Co-op)	2,353	77	1,812	12,710	23,028
Tesco Express, Goring Way (formerly Fads)	640	90	576	14,330	8,254
ALL STORES	9,173		6,599	12,762	84,213

Sources: IGD, DTZ, Verdict Research.

Notes (1) The Tesco is part of the defined District Centre of West Durrington, although for the purposes of consistency with the 2005 DTZ study has been included in the Non Central category. Also, this store was replaced by a larger store (see Table 29) in February 2010.

Table: **27**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & SUPERSTORES *

Net to gross ratio: 85 %		Date of sales densities:		2008
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2006/07 (£per sqm net)	Sales 2008 (£000)
Wickes, Dominion Road	n/a	1,853	2,241	4,153
Carpetright, Ham Road/ Pages Lane	n/a	1,187	1,266	1,503
MFI, Ham Road/ Pages Lane**	n/a	-	-	-
Boots, Lyons Farm Retail Park	n/a	742	8,144	6,043
Brantano, Lyons Farm Retail Park	n/a	662	1,725	1,142
Currys, Lyons Farm Retail Park	n/a	1,265	6,831	8,641
Pets at Home, Lyons Farm Retail Park	697	592	2,464	1,460
Argos Extra, Lyons Farm Retail Park***	n/a	1,394	-	5,433
B&Q, Lyons Way, Upper Brighton Road	n/a	2,890	1,875	5,419
Halfords, Lyons Way****	n/a	1,583	2,328	3,685
Comet, Teville Way	n/a	952	7,249	6,901
Sainsbury's, Lyons Farm Retail Park*	n/a	767	6,737	5,166
Tesco (1), New Road*	n/a	1,202	8,490	10,208
Morrisons, New Road (formerly Co-op)*	n/a	541	7,719	4,177
		-		
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TOTALS		15,631	**4,090**	63,931

Sources: Retail Rankings', Mintel, with VAT added for compatibility with expenditure. DTZ estimates in some cases.
Experian Goad and VOA Rating List for floorspace.
** Unless otherwise indicated.

Notes:
* Comparison goods floorspace in food/non-food superstores
**MFI store currently vacant (2,030 sqm net). Pl. application for additional 1,616 sqm mezzanine rec'd Dec 09 (The Range).
***Sales based on average sales per outlet rather than applying a sales density to the sales area.
****1,804 sq m net sales area. However, 25% had been deducted to take account of Motor Parts & Acc Sales (non-retail).

Table: **28**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS **2016**

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Old Tesco, West Durrington			1,202	8,490	10,205
New Tesco, West Durrington (opened Feb 2010)			3,624	8,490	30,768
Net additional comparison goods sales resulting from new store			-		**20,563**
			-		
Pets at Home - extant planning permission for mezzanine floor			325	2,464	801
			-		
			-		
			-		
			-		
			-		
ALL STORES AND SCHEMES	-		5,151	4,147	**21,364**

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 29

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central Stores in Worthing**

Baseline - Market Shares based on the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2010 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	111,295	126,915	140,667	152,229		65,710	84,769	108,067	134,782	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	111,295	126,915	140,667	152,229		65,710	84,769	108,067	134,782	
Existing shop floorspace Baseline - Market Shares based o	6,599	6,599	6,599	6,599		15,631	15,631	15,631	15,631	
Sales per sq m net (£)	16,866	12,762	12,762	12,762		4,204	4,607	4,963	5,347	
Sales from extg flrspce (£000)	111,295	84,213	84,213	84,213		65,710	72,018	77,583	83,579	
Available spending to support new shops (£000)	0	42,702	56,453	68,015		0	12,752	30,484	51,203	
Less sales capacity of committed new floorspace (£000)*	12,104	12,104	12,104	12,104		21,364	23,360	25,165	27,110	
Net available spending for new shops (£000)	-12,104	30,598	44,349	55,911		-21,364	-10,608	5,318	24,093	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,374	4,712	5,076	
Capacity for new shop flrspc (sq m net)	**-1,009**	**2,550**	**3,696**	**4,659**		**-5,341**	**-2,425**	**1,129**	**4,746**	

Market Share of Catchment Area Expenditure	6.6%	6.7%	6.8%	6.9%		2.7%	2.8%	2.8%	2.8%	

Sources: RECAP Model.

Notes:
1. Excludes vacant floorspace (i.e. ex-MFI unit at Lyons Farm, Worthing)
2.*The new Tesco Extra at West Durrington opened in Feb 2010. It has a total sales area of 7,248 sq m. Assuming 50% of this is devoted to convenience

Scenario 2

Worthing Town Centre

Table: **30**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Worthing Town Centre**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Market shares correction factors:
Convenience Goods: 270 % of survey indicated figures
Comparison Goods: 90 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2	2	2	2
4	0	0	0	0	3	3	3	3
5	2	2	2	2	24	26	26	26
6	24	24	24	24	43	52	52	52
7	1	1	1	1	8	10	10	10

Sources: RECAP Model.
DTZ for market share corrections.

Table: **31**

FORECAST RETAIL SALES

Scenario: 2 Location: **Worthing Town Centre**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	793	1,060	1,394	1,786
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2,444	3,052	3,817	4,676
4	0	0	0	0	5,958	7,544	9,535	11,799
5	2,656	3,043	3,417	3,742	45,545	64,767	84,067	106,554
6	49,050	56,149	62,342	67,573	125,570	199,155	255,597	320,723
7	9,761	10,741	11,705	12,472	111,579	175,836	221,492	273,211
TOTALS	61,468	69,934	77,465	83,787	291,888	451,415	575,902	718,750

Sources: RECAP Model.

Table: **32**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Worthing Town Centre**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	61,468	69,934	77,465	83,787		291,888	451,415	575,902	718,750	
Plus visitors' spending (%)	2.0	2.0	2.0	2.0		5.0	5.0	5.0	5.0	
Total spending (£000)	62,697	71,332	79,014	85,462		306,482	473,985	604,697	754,687	
Existing shop floorspace (sq m net)	7,800	7,800	7,800	7,800		55,683	55,683	55,683	55,683	
Sales per sq m net (£)	8,038	8,036	8,036	8,036		5,504	5,929	6,388	6,881	
Sales from extg flrspce (£000)	62,697	62,682	62,682	62,682		306,482	330,169	355,685	383,174	
Available spending to support new shops (£000)	0	8,651	16,332	22,781		0	143,817	249,012	371,513	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	8,651	16,332	22,781		0	143,817	249,012	371,513	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		5,000	5,386	5,803	6,251	
Capacity for new shop flrspc (sq m net)	**0**	**721**	**1,361**	**1,898**		**0**	**26,700**	**42,913**	**59,431**	

Market Share of Catchment Area Expenditure	3.6%	3.7%	3.8%	3.8%		12.1%	14.7%	14.8%	14.8%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Experian Goad Survey

Scenario 2

District and Medium Scale Local Centres in Worthing

Table: **33**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **District and Medium Scale Local Centres in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Market shares correction factors: Convenience Goods: 350 % of survey indicated figures; Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	11	11	11	11	13	12	12	12
7	1	1	1	1	0	0	0	0

Sources: RECAP Model.
DTZ for market share corrections.

Table: **34**

FORECAST RETAIL SALES

Scenario: 2 Location: **District and Medium Scale Local Centres in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	22,481	25,735	28,574	30,971	37,963	45,959	58,984	74,013
7	9,761	10,741	11,705	12,472	0	0	0	0
TOTALS	32,243	36,476	40,279	43,443	37,963	45,959	58,984	74,013

Sources: RECAP Model.

Table: **35**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **District and Medium Scale Local Centres in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	32,243	36,476	40,279	43,443		37,963	45,959	58,984	74,013	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	32,243	36,476	40,279	43,443		37,963	45,959	58,984	74,013	
Existing shop floorspace (sq m net)	6,212	6,212	6,212	6,212		11,083	11,083	11,083	11,083	
Sales per sq m net (£)	5,191	5,318	5,318	5,318		3,425	3,690	3,975	4,283	
Sales from extg flrspce (£000)	32,243	33,033	33,033	33,033		37,963	40,897	44,058	47,462	
Available spending to support new shops (£000)	0	3,443	7,246	10,410		0	5,062	14,926	26,551	
Less sales capacity of committed new floorspace (£000)	3,467	3,467	3,467	3,467		0	0	0	0	
Net available spending for new shops (£000)	-3,467	-23	3,779	6,943		0	5,062	14,926	26,551	
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000		4,000	4,309	4,642	5,001	
Capacity for new shop flrspc (sq m net)	**-347**	**-2**	**378**	**694**		**0**	**1,175**	**3,215**	**5,309**	

Market Share of Catchment Area Expenditure	1.9%	1.9%	2.0%	2.0%		1.6%	1.5%	1.5%	1.5%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Experian Goad Survey

Scenario 2

Non-central Stores in Worthing

Table: **36**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Non-central Stores in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Market shares correction factors: Convenience Goods: 74 % of survey indicated figures
Comparison Goods: 40 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	1	1	1	1	0	0	0	0
5	0	0	0	0	3	3	3	3
6	49	49	49	49	11	10	10	10
7	1	1	1	1	2	2	2	2

Sources: RECAP Model.
DTZ for market share corrections.

Table: **37**

FORECAST RETAIL SALES

Scenario: 2 Location: **Non-central Stores in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	1,390	1,536	1,680	1,795	0	0	0	0
5	0	0	0	0	5,693	7,473	9,700	12,295
6	100,144	114,638	127,282	137,961	32,122	38,299	49,153	61,678
7	9,761	10,741	11,705	12,472	27,895	35,167	44,298	54,642
TOTALS	111,295	126,915	140,667	152,229	65,710	80,939	103,152	128,615

Sources: RECAP Model.

Table: **38**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Non-central Stores in Worthing**

Market Shares of comparison goods expenditure attracted by Worthing Town Centre increase from 2016, as a result of a major town centre development.

Growth in sales per sq m from shop floorspace existing in 2010 Comparison Goods: 1.50 % pa 2010 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	111,295	126,915	140,667	152,229		65,710	80,939	103,152	128,615	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	111,295	126,915	140,667	152,229		65,710	80,939	103,152	128,615	
Existing shop floorspace (sq m net)	6,599	6,599	6,599	6,599		15,631	15,631	15,631	15,631	
Sales per sq m net (£)	16,866	12,762	12,762	12,762		4,204	4,607	4,963	5,347	
Sales from extg flrspce (£000)	111,295	84,213	84,213	84,213		65,710	72,018	77,583	83,579	
Available spending to support new shops (£000)	0	42,702	56,453	68,015		0	8,922	25,568	45,035	
Less sales capacity of committed new floorspace (£000)	12,104	12,104	12,104	12,104		21,364	23,360	25,165	27,110	
Net available spending for new shops (£000)	-12,104	30,598	44,349	55,911		-21,364	-14,438	403	17,925	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,374	4,712	5,076	
Capacity for new shop flrspc (sq m net)	**-1,009**	**2,550**	**3,696**	**4,659**		**-5,341**	**-3,301**	**86**	**3,531**	

Market Share of Catchment Area Expenditure	6.6%	6.7%	6.8%	6.9%		2.7%	2.6%	2.6%	2.7%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Experian Goad Survey

Total Market Shares

Table: **39**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2010

SHOPPING LOCATION	COMPARISON GOODS TYPE					
	Clothing & footwear	Furniture, floor coverings & Hh textiles	Household appliances	Audio-visual equipment	DIY goods & hardware	Other comparison goods
Worthing Town Centre	19%	0%	1%	2%	1%	19%
District and Medium Scale Local Centres in Worthing	2%	1%	1%	1%	1%	2%
Non-central Stores in Worthing	0%	6%	9%	8%	7%	0%
Totals Worthing	**21%**	**8%**	**11%**	**11%**	**10%**	**21%**

Sources: RECAP Model
Notes:

Table: **40**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Worthing

Catchment Zones	Worthing Town Centre, District Centres, & non-central stores							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2	2	2	2
4	1	1	1	1	3	3	3	3
5	2	2	2	2	27	27	27	27
6	84	84	84	84	67	67	67	67
7	3	3	3	3	10	10	10	10
OVERALL	**12.1%**	**12.4%**	**12.5%**	**12.6%**	**16.4%**	**16.6%**	**16.7%**	**16.8%**

Sources: RECAP Model

Table: **41**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Worthing

Catchment Zones	Worthing Town Centre, District Centres, & non-central stores							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0
3	0	0	0	0	2	2	2	2
4	1	1	1	1	3	3	3	3
5	2	2	2	2	27	29	29	29
6	84	84	84	84	67	74	74	74
7	3	3	3	3	10	12	12	12
OVERALL	**12.1%**	**12.4%**	**12.5%**	**12.6%**	**16.4%**	**18.8%**	**18.9%**	**19.0%**

Sources: RECAP Model