RECAP

The Retail Capacity forecasting Model

Project:	**Crawley Retail Study Update 2013**	Number:	13119800
Client:	Crawley Borough Council	Status:	**DRAFT**
Date of Latest Revision:	22-Jul-13	File:	Crawley RECAP Model 2013

Retail Locations Modelled:

- Crawley Town Centre
- Non-central Stores in Crawley

Scenarios Modelled:

1	Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.
2	Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Notes:

Copyright: **DTZ**

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year 2012	Forecasting Years 2017	2022	2029
1	RH10 - 1, 3, 5, 6, 7, 8, 9; RH11 - 0, 6, 7, 8, 9	117,519	125,719	132,827	144,075
2	RH6 - 0, 7, 8, 9	30,603	32,660	34,549	37,465
3	RH10 - 4; RH18 - 5; RH19 - 1, 2, 3, 4	43,124	44,936	46,752	49,260
4	RH16 - 1, 2, 3, 4; RH17 - 5, 6, 7	50,195	52,569	54,859	58,080
5	RH12 - 1, 2, 4, 5; RH13 - 5, 6	53,659	55,467	57,337	59,928
6	RH3 - 7; RH4 - 1, 2, 3: RH5 - 4, 5, 6; KT20 - 7	40,628	42,117	43,463	45,461
7	RH1 - 1, 2, 3, 4, 5, 6; RH2 - 0, 7, 8, 9	75,985	82,032	87,568	95,900
8	RH7 - 6; RH8 - 0, 9; TH9 - 8; TN8 - 5, 6, 7; TN16 - 1, 2, 3	63,457	66,533	69,765	74,080
9	CR3 - 0, 5, 6, 7; CR5 - 1, 2, 3; CR6 - 9; CR8 - 4, 5; KT20 - 5, 6	96,110	101,620	107,403	115,074
10	BN8 - 4; TN7 - 4; TN22 - 1, 2, 3, 4, 5	33,646	35,499	37,483	40,197
11	BN5 - 9; BN6 - 8, 9; RH15 - 0, 8, 9	55,954	58,068	60,089	63,036
12	RH12 - 3; RH13 - 0, 8, 9; RH14 - 9	37,217	39,492	41,877	45,014
TOTAL		698,097	736,712	773,972	827,570

Sources:

Pitney Bowes Ltd - Anysite Report for Crawley Catchment Area, June 2013

Notes:

Pitney Bowes population forecasts are only up to 2022. Forecasts for 2029 extrapolated by trend projection.

Table: **2**

CATCHMENT AREA PER CAPITA EXPENDITURE

Price Basis: **2011** Prices

Catchment Zone	CONVENIENCE GOODS – Per Capita Expenditure Including Special Form of Trading – Base Year 2012	Forecasting Years 2017	2022	2029	COMPARISON GOODS – Per Capita Expenditure Including Special Form of Trading – Base Year 2012	Forecasting Years 2017	2022	2029
1	2,231	2,179	2,151	2,143	3,339	4,233	5,000	5,660
2	2,315	2,261	2,231	2,222	3,614	4,583	5,407	6,121
3	2,202	2,152	2,125	2,119	3,480	4,415	5,210	5,899
4	2,181	2,132	2,106	2,101	3,414	4,321	5,094	5,764
5	2,324	2,275	2,251	2,251	3,711	4,709	5,568	6,306
6	2,383	2,332	2,305	2,303	3,840	4,876	5,765	6,531
7	2,312	2,264	2,238	2,237	3,666	4,661	5,506	6,239
8	2,300	2,229	2,203	2,186	3,765	4,720	5,577	6,297
9	2,152	2,070	2,045	2,020	3,534	4,384	5,171	5,822
10	2,153	2,102	2,073	2,064	3,394	4,300	5,072	5,741
11	2,173	2,121	2,093	2,084	3,382	4,275	5,039	5,699
12	2,251	2,199	2,168	2,160	3,631	4,620	5,457	6,186
Catchment Area Average	2,156	2,185	2,158	2,180	3,543	4,478	5,287	5,980
Expenditure on Special Forms of Trading (%)	4.8	5.5	6.0	7.0	13.5	15.0	17.0	18.0

Catchment Zone	Per Capita Expenditure EXCLUDING Special Form of Trading – Base Year 2012	Forecasting Years 2017	2022	2029	Per Capita Expenditure EXCLUDING Special Form of Trading – Base Year 2012	Forecasting Years 2017	2022	2029
1	2,124	2,059	2,022	1,993	2,888	3,598	4,150	4,641
2	2,204	2,137	2,097	2,067	3,126	3,896	4,488	5,020
3	2,096	2,034	1,998	1,971	3,010	3,753	4,324	4,837
4	2,076	2,015	1,980	1,954	2,953	3,673	4,228	4,726
5	2,212	2,150	2,116	2,093	3,210	4,003	4,621	5,171
6	2,269	2,204	2,167	2,142	3,322	4,145	4,785	5,356
7	2,201	2,139	2,104	2,081	3,171	3,962	4,570	5,116
8	2,190	2,106	2,071	2,033	3,257	4,012	4,629	5,164
9	2,049	1,956	1,922	1,879	3,057	3,726	4,292	4,774
10	2,050	1,986	1,949	1,920	2,936	3,655	4,210	4,708
11	2,069	2,004	1,967	1,938	2,925	3,634	4,182	4,673
12	2,143	2,078	2,038	2,009	3,141	3,927	4,529	5,072
Catchment Area Average	2,053	2,065	2,029	2,027	3,065	3,806	4,388	4,904

Source: Pitney Bowes 'Anysite Report' for the Catchment Area, June 2013; with trend-based extrapolation to 2029 by DTZ. SFT deductions by DTZ, based on forecasts by Oxford Economics & Verdict Research Limited.

Table: 3

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)
1	249,600	258,875	268,568	287,105	339,422	452,343	551,232	668,697
2	67,445	69,783	72,454	77,431	95,668	127,229	155,049	188,058
3	90,401	91,384	93,387	97,073	129,812	168,634	202,170	238,292
4	104,220	105,913	108,601	113,468	148,231	193,078	231,945	274,502
5	118,718	119,247	121,322	125,442	172,246	222,015	264,980	309,871
6	92,169	92,815	94,171	97,363	134,950	174,558	207,968	243,467
7	167,245	175,506	184,219	199,544	240,955	324,998	400,184	490,652
8	138,945	140,145	144,471	150,635	206,662	266,930	322,936	382,523
9	196,901	198,784	206,461	216,176	293,800	378,677	460,966	549,370
10	68,963	70,515	73,040	77,165	98,778	129,749	157,794	189,242
11	115,752	116,388	118,220	122,183	163,690	211,005	251,314	294,554
12	79,754	82,067	85,342	90,431	116,892	155,085	189,674	228,322
TOTALS	1,490,114	1,521,421	1,570,256	1,654,017	2,141,107	2,804,301	3,396,213	4,057,550

Sources: RECAP Tables 1 and 2

Table: 4

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2012 for the catchment area as a whole **2011** Prices

	Clothing & footwear	Furniture & floor coverings	Household textiles	Domestic appliances	Audio-visual & computer equipment	DIY goods & decorating supplies	Chemist's goods, medical & beauty products	All other comparison goods	Total Comparison Goods
Including SFT (£)	915	272	118	118	403	259	483	975	3,543
Deduction for SFT (%)	8.9	5.5	10.0	15.5	32.0	6.0	4.5	19.0	13.5
Excluding SFT (£)	834	257	106	100	274	243	461	790	3,065

Source: Pitney Bowes 'Anysite Report' for the catchment area, June 2013.
SFT deductions estimated by DTZ based on forecasts by Oxford Economics & Verdict Research Limited.

Table: 5

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2012

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)
1	92,319	28,468	11,762	11,043	30,351	26,964	51,086	87,467
2	26,021	8,024	3,315	3,113	8,555	7,600	14,399	24,653
3	35,307	10,887	4,498	4,223	11,608	10,312	19,538	33,452
4	40,317	12,432	5,137	4,823	13,255	11,776	22,310	38,198
5	46,849	14,447	5,969	5,604	15,402	13,683	25,925	44,387
6	36,705	11,318	4,676	4,391	12,067	10,720	20,311	34,776
7	65,537	20,209	8,350	7,839	21,546	19,142	36,266	62,092
8	56,210	17,333	7,161	6,724	18,479	16,417	31,105	53,255
9	79,910	24,641	10,181	9,559	26,271	23,340	44,220	75,710
10	26,867	8,285	3,423	3,214	8,833	7,847	14,867	25,454
11	44,522	13,729	5,672	5,326	14,637	13,004	24,637	42,182
12	31,793	9,804	4,051	3,803	10,452	9,286	17,593	30,122
TOTALS	582,359	179,577	74,195	69,661	191,454	170,090	322,256	551,748

Sources: RECAP Tables 1 and 4

Scenario 1

Crawley Town Centre

Table: 6

CONVENIENCE GOODS MARKET SHARES IN 2012

2012 Allocations to Crawley Town Centre Indicated by household interview survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	29.9	31.9	30.4
2	4.0	4.0	4.0
3	2.0	7.0	3.3
4	1.0	1.0	1.0
5	2.0	1.0	1.8
6	1.0	1.0	1.0
7	0.0	0.7	0.2
8	0.8	0.0	0.6
9	0.5	0.5	0.5
10	0.0	0.0	0.0
11	0.0	0.0	0.0
12	0.0	0.0	0.0

Sources: Household Interview Survey 2010.
Expenditure weighting by DTZ.

Table: 7

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2012

	2012 Allocations to Crawley Town Centre Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	834	257	106	100	274	243	461	790	3,065
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	84.6	27.2	57.6	29.6	33.0	28.7	63.9	83.1	64.5
2	64.6	26.7	33.7	22.8	28.2	22.6	26.0	54.7	44.0
3	56.5	19.3	37.8	23.2	16.5	9.4	10.4	32.5	31.2
4	36.8	12.0	21.1	8.8	12.0	5.6	3.1	21.8	19.6
5	19.8	11.3	9.9	5.0	7.9	5.4	6.1	12.6	12.1
6	18.9	5.3	10.5	3.9	5.3	1.1	2.2	7.2	8.8
7	34.7	16.8	23.9	9.4	11.1	1.5	1.5	18.7	18.1
8	15.9	4.9	7.0	3.3	7.3	1.9	2.5	12.4	9.5
9	4.0	3.3	4.4	2.0	2.9	1.1	0.6	2.7	2.7
10	5.6	1.2	2.4	2.5	1.3	0.0	0.0	2.4	2.5
11	17.8	9.2	11.4	1.3	1.5	1.1	1.0	8.9	8.7
12	14.6	4.9	6.5	5.4	6.9	0.0	1.0	7.9	7.6

Sources: Household Interview Survey 2010.
RECAP Table 2 for expenditure weights.

Table: 8

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Crawley Town Centre**

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 85 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (%)	2017 (%)	2022 (%)	2029 (%)	2012 (%)	2017 (%)	2022 (%)	2029 (%)
1	30	30	30	30	55	55	55	55
2	4	4	4	4	37	37	37	37
3	3	3	3	3	27	27	27	27
4	1	1	1	1	17	17	17	17
5	2	2	2	2	10	10	10	10
6	1	1	1	1	7	7	7	7
7	0	0	0	0	15	15	15	15
8	1	1	1	1	8	8	8	8
9	1	1	1	1	2	2	2	2
10	0	0	0	0	2	2	2	2
11	0	0	0	0	7	7	7	7
12	0	0	0	0	6	6	6	6

Sources: RECAP Model.
DTZ for market share corrections.

Table: **9**

COMPARISON GOODS SALES BY GOODS TYPE IN 2012

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2012 Sales in **Crawley Town Centre** By Comparison Goods Type.							
1	66,387	6,582	5,759	2,778	8,513	6,578	27,747	61,782
2	14,288	1,821	950	603	2,051	1,460	3,182	11,462
3	16,956	1,786	1,445	833	1,628	824	1,727	9,241
4	12,611	1,268	921	361	1,352	561	588	7,078
5	7,885	1,388	502	238	1,034	628	1,344	4,754
6	5,897	510	417	146	544	100	380	2,128
7	19,330	2,886	1,696	626	2,033	244	462	9,870
8	7,597	722	426	189	1,147	265	661	5,613
9	2,717	691	381	162	648	218	226	1,738
10	1,279	85	70	68	98	0	0	519
11	6,736	1,074	550	59	187	122	209	3,191
12	3,946	408	224	175	613	0	150	2,023
TOTALS	165,628	19,220	13,341	6,238	19,846	11,000	36,677	119,399
MARKET SHARES	28.4%	10.7%	18.0%	9.0%	10.4%	6.5%	11.4%	21.6%

Sources: RECAP Model.

Table: **10**

FORECAST RETAIL SALES

Scenario: 1 Location: **Crawley Town Centre**

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)
1	74,880	77,662	80,570	86,132	186,682	248,789	303,178	367,783
2	2,698	2,791	2,898	3,097	35,397	47,075	57,368	69,582
3	2,712	2,742	2,802	2,912	35,049	45,531	54,586	64,339
4	1,042	1,059	1,086	1,135	25,199	32,823	39,431	46,665
5	2,374	2,385	2,426	2,509	17,225	22,201	26,498	30,987
6	922	928	942	974	9,446	12,219	14,558	17,043
7	0	0	0	0	36,143	48,750	60,028	73,598
8	1,389	1,401	1,445	1,506	16,533	21,354	25,835	30,602
9	1,969	1,988	2,065	2,162	5,876	7,574	9,219	10,987
10	0	0	0	0	1,976	2,595	3,156	3,785
11	0	0	0	0	11,458	14,770	17,592	20,619
12	0	0	0	0	7,014	9,305	11,380	13,699
TOTALS	87,987	90,957	94,234	100,426	387,999	512,986	622,828	749,689

Sources: RECAP Model.

Table: **11**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2012

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)
Asda	5,013	60	3,008	14,006	42,127
Sainsburys Central	1,141	90	1,027	12,715	13,057
Marks & Spencer	1,047	93	974	10,900	10,613
Other Convenience Goods Shops	893	90	803	5,000	4,016
ALL STORES	8,094		5,812	12,013	69,814

Sources: IGD, Experian Goad, DTZ, Verdict Research.

Table: **12**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2012

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)
Morrisons, Sussex House site (CR/2011/0431/FUL)	3,939	80	3,151	12,420	39,138
ALL STORES	3,939		3,151	12,420	39,138

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Morrisons, Sussex House site (CR/2011/0431/FUL)			788	7,363	5,801
County Mall extension (CR/2011/0487/FUL)			945	6,000	5,670
ALL STORES AND SCHEMES	-		1,733	6,620	11,471

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

Table: **13**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Crawley Town Centre**

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2012 Comparison Goods: 2.50 % pa 2012 to 2029

	CONVENIENCE GOODS					COMPARISON GOODS				
	2012	2017	2022	2029		2012	2017	2022	2029	
Residents' Spending £000	87,987	90,957	94,234	100,426		387,999	512,986	622,828	749,689	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	87,987	90,957	94,234	100,426		387,999	512,986	622,828	749,689	
Existing shop floorspace (sq m net)	5,812	5,812	5,812	5,812		68,538	65,563	65,563	65,563	
Sales per sq m net (£)	15,140	12,013	12,013	12,013		5,661	6,405	7,247	8,614	
Sales from extg flrspce (£000)	87,987	69,814	69,814	69,814		387,999	419,930	475,113	564,760	
Available spending to support new shops (£000)	0	21,143	24,420	30,612		0	93,056	147,715	184,929	
Less sales capacity of committed new floorspace (£000)	0	39,138	39,138	39,138		0	12,978	14,683	17,454	
Net available spending for new shops (£000)	0	(17,995)	(14,718)	(8,526)		0	80,078	133,032	167,475	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		5,000	5,657	6,400	7,608	
Capacity for new shop flrspc (sq m net)	**0**	**(1,500)**	**(1,227)**	**(710)**		**0**	**14,155**	**20,785**	**22,013**	

Market Share of Catchment Area Expenditure	5.9%	6.0%	6.0%	6.1%		18.1%	18.3%	18.3%	18.5%	

Sources: RECAP Model. Experian Goad for Comparison Goods Floorspace.

Notes: Includes vacant floorspace in Queens Square, Queensway, The Martletts and County Mall.
Proposed Asda extension not included as a committed development because planning permission has not been granted.

Scenario 1

Non-central Stores in Crawley

Table: 14

CONVENIENCE GOODS MARKET SHARES IN 2012

2012 Allocations to

Non-central Stores in Crawley

Indicated by household interview survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	58.2	32.3	51.7
2	5.0	3.0	4.5
3	15.0	4.0	12.3
4	6.0	0.0	4.5
5	3.0	1.0	2.5
6	3.0	2.0	2.8
7	0.0	1.4	0.4
8	1.7	1.7	1.7
9	1.1	0.0	0.8
10	0.0	0.0	0.0
11	0.0	0.0	0.0
12	1.0	1.0	1.0

Sources: Household Interview Survey 2010.
Expenditure weighting by DTZ.

Table: 15

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2012

2012 Allocations to

Non-central Stores in Crawley

Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
	Expenditure weighting								
	834	257	106	100	274	243	461	790	3,065
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	2.9	43.6	27.6	63.4	62.4	68.5	11.1	6.0	21.7
2	2.1	34.9	24.6	49.4	44.9	56.0	1.0	2.7	15.3
3	0.0	15.7	7.3	35.4	39.2	9.4	3.1	2.4	8.1
4	0.0	10.7	6.6	18.8	12.0	10.2	1.0	0.0	3.8
5	0.0	10.0	2.5	11.3	10.5	4.3	0.0	0.0	2.6
6	0.0	8.0	2.6	9.2	14.5	3.3	1.1	0.0	2.8
7	0.8	19.6	6.2	22.6	25.0	6.1	0.7	0.0	5.6
8	0.9	6.9	4.0	9.8	7.3	1.9	0.8	0.0	2.2
9	0.0	0.7	0.0	0.7	1.5	0.0	0.0	0.7	0.4
10	0.0	1.2	0.0	0.0	2.5	1.1	0.0	0.0	0.4
11	0.0	5.3	1.3	5.3	2.9	0.0	0.0	0.0	0.9
12	0.0	12.3	3.9	13.5	12.5	3.1	0.0	0.0	3.0

Sources: Household Interview Survey 2010.
RECAP Table 2 for expenditure weights.

Table: **16**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

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

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	90	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (%)	2017 (%)	2022 (%)	2029 (%)	2012 (%)	2017 (%)	2022 (%)	2029 (%)
1	52	52	52	52	20	20	20	20
2	5	5	5	5	14	14	14	14
3	12	12	12	12	7	7	7	7
4	5	5	5	5	3	3	3	3
5	3	3	3	3	2	2	2	2
6	3	3	3	3	3	3	3	3
7	0	0	0	0	5	5	5	5
8	2	2	2	2	2	2	2	2
9	1	1	1	1	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	1	1	1	1
12	1	1	1	1	3	3	3	3

Sources: RECAP Model.
DTZ for market share corrections.

Table: **17**

COMPARISON GOODS SALES BY GOODS TYPE IN 2012

Catchment Zones	2012 Sales in **Non-central Stores in Crawley** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	2,410	11,171	2,922	6,301	17,045	16,623	5,104	4,723
2	492	2,520	734	1,384	3,457	3,830	130	599
3	0	1,538	296	1,346	4,095	872	545	723
4	0	1,197	305	816	1,431	1,081	201	0
5	0	1,300	134	570	1,455	530	0	0
6	0	815	109	364	1,575	318	201	0
7	472	3,565	466	1,595	4,848	1,051	228	0
8	455	1,076	258	593	1,214	281	224	0
9	0	155	0	60	355	0	0	477
10	0	89	0	0	199	78	0	0
11	0	655	66	254	382	0	0	0
12	0	1,085	142	462	1,176	259	0	0
TOTALS	3,828	25,168	5,432	13,744	37,232	24,923	6,633	6,522
MARKET SHARES	0.7%	14.0%	7.3%	19.7%	19.4%	14.7%	2.1%	1.2%

Sources: RECAP Model.

Table: **18**

FORECAST RETAIL SALES

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

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)
1	129,792	134,615	139,655	149,295	67,884	90,469	110,246	133,739
2	3,372	3,489	3,623	3,872	13,394	17,812	21,707	26,328
3	10,848	10,966	11,206	11,649	9,087	11,804	14,152	16,680
4	5,211	5,296	5,430	5,673	4,447	5,792	6,958	8,235
5	3,562	3,577	3,640	3,763	3,445	4,440	5,300	6,197
6	2,765	2,784	2,825	2,921	4,048	5,237	6,239	7,304
7	0	0	0	0	12,048	16,250	20,009	24,533
8	2,779	2,803	2,889	3,013	4,133	5,339	6,459	7,650
9	1,969	1,988	2,065	2,162	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	1,637	2,110	2,513	2,946
12	798	821	853	904	3,507	4,653	5,690	6,850
TOTALS	161,095	166,339	172,187	183,251	123,630	163,906	199,273	240,463

Sources: RECAP Model.

Table: **19**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2012

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)
Tesco Extra, Hazelwick Avenue, RH10 1GY	6,600	55	3,630	11,379	41,306
Sainsburys, Crawley Avenue, RH10 8NF	6,426	n/a	4,562	12,715	58,006
Morrisons, Broadfield, RH11 9BA	1,078	95	1,024	12,420	12,719
Iceland, Broadfield, RH11 9BA	477	96	458	7,341	3,362
Premier, Broadfield, RH11 9BA	196	95	186	4,000	745
Co-op, Bewbush, RH11 8XW	650	80	520	7,389	3,842
Welcome (Co-op), Langley Green, RH11 7RS	278	85	236	7,389	1,746
Tesco Express, Pound Hill, RH10 3BA	202	95	192	11,379	2,184
Welcome (Co-op), Pound Hill, RH10 7EA	139	95	132	7,389	976
Co-op, Tilgate Parade, RH10 5EQ	267	85	227	7,389	1,677
Tesco Express, Downland Drive, RH11 8SW	181	95	172	11,379	1,957
Co-op, Ifield Drive, RH11 0EL	124	95	118	7,389	870
Tesco Express, Ifield, RH11 0PL	124	95	118	11,379	1,340
Welcome (Co-op), Maidenbower, RH10 7QH	218	90	196	7,389	1,450
Lidl, Three Bridges, RH10 1NP	650	78	507	3,008	1,525
Tesco Express, Astral Towers, Betts Way	252	90	227	11,379	2,581
Tesco Metro, Haslett Avenue	240	90	216	11,379	2,458
ALL STORES	18,102		12,721	10,907	138,743

Sources: IGD, DTZ, Verdict Research.

Table: **20**

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)	Date of sales densities:			2011
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2011 (£per sqm net)	Sales 2011 (£000)
County Oak Retail Park:				
Paul Simon (Unit 1b)	n/a	828	2,064	1,709
Next (Unit 1c)	n/a	1,664	4,510	7,505
Hobbycraft (Unit 2a) (5)	n/a	1,208	n/a	2,029
Argos (Unit 2b) (5)	1,097	876	n/a	6,204
Harveys/Bensons/Ponden Home (Unit 2c)	n/a	2,657	2,305	6,124
Staples (Unit 3) (1)	n/a	922	1,345	1,240
Currys & PC World (Units 4a & 4b) (2)	n/a	3,300	6,125	20,213
Halfords (3)	n/a	1,651	2,904	4,795
Other Retail Warehouses in Crawley:				
Pets at Home	612	551	2,473	1,362
B&Q (4)	n/a	3,848	2,047	7,877
Carpetright	1,530	1,454	1,104	1,605
Homebase	4,121	4,005	1,252	5,014
Dreams	2,747	2,472	1,685	4,166
Bathstore	750	675	n/a	706
Sussex Carpet Centre	750	675	1,000	675
Wickes Kitchens & Bathrooms	1,000	900	2,352	2,117
County Beds	750	675	1,250	844
Topps Tiles	830	747	1,144	855
Matalan	n/a	2,198	2,341	5,146
Squires Garden Centre, Horsham Road	1,323	n/a	n/a	3,000
Comparison Goods Floorspace in Food superstores:				
Tesco Extra, Hazelwick Avenue, RH10 1GY	n/a	2,970	8,854	26,296
Sainsburys, Crawley Avenue, RH10 8NF	n/a	1,864	7,170	13,365
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		36,140	**3,399**	122,845

Sources: Retail Rankings', Mintel 2013, with VAT added for compatibility with expenditure.
DTZ. Verdict Research. Floorspace for retail warehouses derived from VOA Rating List 2010 or CBC GIS.

Notes:
(1) 1,843 sq m total net sales area, but 50% excluded as non-retail (i.e. business) sales.
(2) 3,668 sq m total net sales area, but 10% excluded as non-retail (i.e. business) sales of computer-related products.
(3) Average sales per outlet are £2.191m, but 40% excluded as non-retail (vehicle parts & accessories).
(4) 4,997 sq m total net sales area, but 23% excluded as non-retail (i.e. trade) sales.
Where no sales density is indicated, sales are based on average sales per outlet.
Wyevale Garden Centre, Copthorne Road, not included as it is outside Crawley Borough.

Table: **21**

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)
Foodstore at Betts Way (Ref: CR/2010/0033/FUL)	2,990	85	2,542	12,000	30,498
ALL STORES	2,990		2,542	12,000	30,498

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Vacant Retail Warehouse (Unit 1a) County Oak Retail Park	1,696	90	1,526	3,500	5,342
Foodstore at Betts Way (Ref: CR/2010/0033/FUL)	n/a	n/a	449	7,500	3,364
Permitted extension to Sainsburys superstore at Crawley Avenue following appeal	n/a	n/a	922	7,170	6,611
ALL STORES AND SCHEMES	-		1,371	7,278	9,974

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

Table: **22**

FORECAST RETAIL CAPACITY

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

Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2012 Comparison Goods: 2.50 % pa 2012 to 2029

	CONVENIENCE GOODS					COMPARISON GOODS				
	2012	2017	2022	2029		2012	2017	2022	2029	
Residents' Spending £000	161,095	166,339	172,187	183,251		123,630	163,906	199,273	240,463	
Plus visitors' spending (%)										
Total spending (£000)	161,095	166,339	172,187	183,251		123,630	163,906	199,273	240,463	
Existing shop floorspace (sq m net)	12,721	12,721	12,721	12,721		36,140	36,140	36,140	36,140	
Sales per sq m net (£)	12,664	10,907	10,907	10,907		3,421	3,942	4,460	5,302	
Sales from extg flrspce (£000)	161,095	138,743	138,743	138,743		123,630	142,462	161,183	191,596	
Available spending to support new shops (£000)	0	27,596	33,444	44,509		0	21,443	38,091	48,867	
Less sales capacity of committed new floorspace (£000)	0	30,498	30,498	30,498		0	9,974	11,285	13,415	
Net available spending for new shops (£000)	0	(2,902)	2,946	14,011		0	11,469	26,805	35,452	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		3,500	3,960	4,480	5,326	
Capacity for new shop flrspc (sq m net)	**0**	**(242)**	**246**	**1,168**		**0**	**2,896**	**5,983**	**6,657**	

Market Share of Catchment Area Expenditure	10.8%	10.9%	11.0%	11.1%		5.8%	5.8%	5.9%	5.9%	

Sources: RECAP Model.

Notes:

Scenario 2

Crawley Town Centre

Table: 23

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Crawley Town Centre**

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures; Comparison Goods: 85 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (%)	2017 (%)	2022 (%)	2029 (%)	2012 (%)	2017 (%)	2022 (%)	2029 (%)
1	30	38	38	38	55	55	62	62
2	4	5	5	5	37	37	43	43
3	3	3	3	3	27	27	30	30
4	1	1	1	1	17	17	18	18
5	2	2	2	2	10	10	11	11
6	1	1	1	1	7	7	7	7
7	0	0	0	0	15	15	16	16
8	1	1	1	1	8	8	8	8
9	1	1	1	1	2	2	2	2
10	0	0	0	0	2	2	2	2
11	0	0	0	0	7	7	7	7
12	0	0	0	0	6	6	6	6

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 24

FORECAST RETAIL SALES

Scenario: 2 Location: **Crawley Town Centre**

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)
1	74,880	98,372	102,056	109,100	186,682	248,789	341,764	414,592
2	2,698	3,489	3,623	3,872	35,397	47,075	66,671	80,865
3	2,712	2,742	2,802	2,912	35,049	45,531	60,651	71,488
4	1,042	1,059	1,086	1,135	25,199	32,823	41,750	49,410
5	2,374	2,385	2,426	2,509	17,225	22,201	29,148	34,086
6	922	928	942	974	9,446	12,219	14,558	17,043
7	0	0	0	0	36,143	48,750	64,029	78,504
8	1,389	1,401	1,445	1,506	16,533	21,354	25,835	30,602
9	1,969	1,988	2,065	2,162	5,876	7,574	9,219	10,987
10	0	0	0	0	1,976	2,595	3,156	3,785
11	0	0	0	0	11,458	14,770	17,592	20,619
12	0	0	0	0	7,014	9,305	11,380	13,699
TOTALS	87,987	112,365	116,444	124,169	387,999	512,986	685,754	825,680

Sources: RECAP Model.

Table: **25**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Crawley Town Centre**

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Growth in sales per sq m from shop floorspace existing in 2012 Comparison Goods: 2.50 % pa 2012 to 2029

	CONVENIENCE GOODS					COMPARISON GOODS				
	2012	2017	2022	2029		2012	2017	2022	2029	
Residents' Spending £000	87,987	112,365	116,444	124,169		387,999	512,986	685,754	825,680	
Plus visitors' spending (%)	-	-	-	-				0.5	0.5	
Total spending (£000)	87,987	112,365	116,444	124,169		387,999	512,986	689,182	829,808	
Existing shop floorspace (sq m net)	5,812	5,812	5,812	5,812		68,538	65,563	65,563	65,563	
Sales per sq m net (£)	15,140	12,013	12,013	12,013		5,661	6,405	7,247	8,614	
Sales from extg flrspce (£000)	87,987	69,814	69,814	69,814		387,999	419,930	475,113	564,760	
Available spending to support new shops (£000)	0	42,551	46,630	54,355		0	93,056	214,070	265,049	
Less sales capacity of committed new floorspace (£000)	0	39,138	39,138	39,138		0	12,978	14,683	17,454	
Net available spending for new shops (£000)	0	3,413	7,492	15,217		0	80,078	199,386	247,595	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		5,000	5,657	6,400	7,608	
Capacity for new shop flrspc (sq m net)	**0**	**284**	**624**	**1,268**		**0**	**14,155**	**31,152**	**32,544**	

Market Share of Catchment Area Expenditure	5.9%	7.4%	7.4%	7.5%		18.1%	18.3%	20.2%	20.3%	

Sources: RECAP Model.

Notes: Includes vacant floorspace in Queens Square, Queensway, The Martletts and County Mall.

Scenario 2

Non-central Stores in Crawley

Table: **26**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

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

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures; Comparison Goods: 90 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (%)	2017 (%)	2022 (%)	2029 (%)	2012 (%)	2017 (%)	2022 (%)	2029 (%)
1	52	47	47	47	20	20	16	16
2	5	5	5	5	14	14	12	12
3	12	12	12	12	7	7	6	6
4	5	5	5	5	3	3	3	3
5	3	3	3	3	2	2	2	2
6	3	3	3	3	3	3	3	3
7	0	0	0	0	5	5	5	5
8	2	2	2	2	2	2	2	2
9	1	1	1	1	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	1	1	1	1
12	1	1	1	1	3	3	3	3

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **27**

FORECAST RETAIL SALES

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

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)	2012 (£000)	2017 (£000)	2022 (£000)	2029 (£000)
1	129,792	121,671	126,227	134,939	67,884	90,469	88,197	106,991
2	3,372	3,489	3,623	3,872	13,394	17,812	18,606	22,567
3	10,848	10,966	11,206	11,649	9,087	11,804	12,130	14,298
4	5,211	5,296	5,430	5,673	4,447	5,792	6,958	8,235
5	3,562	3,577	3,640	3,763	3,445	4,440	5,300	6,197
6	2,765	2,784	2,825	2,921	4,048	5,237	6,239	7,304
7	0	0	0	0	12,048	16,250	20,009	24,533
8	2,779	2,803	2,889	3,013	4,133	5,339	6,459	7,650
9	1,969	1,988	2,065	2,162	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	1,637	2,110	2,513	2,946
12	798	821	853	904	3,507	4,653	5,690	6,850
TOTALS	161,095	153,395	158,759	168,896	123,630	163,906	172,101	207,571

Sources: RECAP Model.

Table: **28**

FORECAST RETAIL CAPACITY

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

Major new retail development in Crawley Town Centre at Town Centre North, altering the balance of market shares from 2017 (convenience goods) and 2022 (comparison goods).

Growth in sales per sq m from shop floorspace existing in 2012 Comparison Goods: 2.50 % pa 2012 to 2029

	CONVENIENCE GOODS					COMPARISON GOODS				
	2012	2017	2022	2029		2012	2017	2022	2029	
Residents' Spending £000	161,095	153,395	158,759	168,896		123,630	163,906	172,101	207,571	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	161,095	153,395	158,759	168,896		123,630	163,906	172,101	207,571	
Existing shop floorspace (sq m net)	12,721	12,721	12,721	12,721		36,140	36,140	36,140	36,140	
Sales per sq m net (£)	12,664	10,907	10,907	10,907		3,421	3,942	4,460	5,302	
Sales from extg flrspce (£000)	161,095	138,743	138,743	138,743		123,630	142,462	161,183	191,596	
Available spending to support new shops (£000)	0	14,653	20,016	30,153		0	21,443	10,919	15,975	
Less sales capacity of committed new floorspace (£000)	0	30,498	30,498	30,498		0	9,974	11,285	13,415	
Net available spending for new shops (£000)	0	(15,845)	(10,482)	(345)		0	11,469	(367)	2,560	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		3,500	3,960	4,480	5,326	
Capacity for new shop flrspc (sq m net)	**0**	**(1,320)**	**(874)**	**(29)**		**0**	**2,896**	**(82)**	**481**	

Market Share of Catchment Area Expenditure	10.8%	10.1%	10.1%	10.2%		5.8%	5.8%	5.1%	5.1%	

Sources: RECAP Model.

Notes:

Total Market Shares for Crawley

Table: **29**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2012

SHOPPING LOCATION	COMPARISON GOODS TYPE							
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
Crawley Town Centre	28.4%	10.7%	18.0%	9.0%	10.4%	6.5%	11.4%	21.6%
Non-central Stores in Crawley	0.7%	14.0%	7.3%	19.7%	19.4%	14.7%	2.1%	1.2%
TOTALS CRAWLEY	**29.1%**	**24.7%**	**25.3%**	**28.7%**	**29.8%**	**21.1%**	**13.4%**	**22.8%**

Sources: RECAP Model
Notes: The totals are not always equal to the sum of the individual figures, owing to rounding.

Table: **30**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Crawley

Catchment Zones	CONVENIENCE GOODS 2012 (%)	2017 (%)	2022 (%)	2029 (%)		COMPARISON GOODS 2012 (%)	2017 (%)	2022 (%)	2029 (%)	
1	82	82	82	82		75	75	75	75	
2	9	9	9	9		51	51	51	51	
3	15	15	15	15		34	34	34	34	
4	6	6	6	6		20	20	20	20	
5	5	5	5	5		12	12	12	12	
6	4	4	4	4		10	10	10	10	
7	0	0	0	0		20	20	20	20	
8	3	3	3	3		10	10	10	10	
9	2	2	2	2		2	2	2	2	
10	0	0	0	0		2	2	2	2	
11	0	0	0	0		8	8	8	8	
12	1	1	1	1		9	9	9	9	
OVERALL	16.7%	16.9%	17.0%	17.2%		23.9%	24.1%	24.2%	24.4%	

Sources: RECAP Model
Notes:

Table: **31**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Crawley

Catchment Zones	CONVENIENCE GOODS 2012 (%)	2017 (%)	2022 (%)	2029 (%)		COMPARISON GOODS 2012 (%)	2017 (%)	2022 (%)	2029 (%)	
1	82	85	85	85		75	75	78	78	
2	9	10	10	10		51	51	55	55	
3	15	15	15	15		34	34	36	36	
4	6	6	6	6		20	20	21	21	
5	5	5	5	5		12	12	13	13	
6	4	4	4	4		10	10	10	10	
7	0	0	0	0		20	20	21	21	
8	3	3	3	3		10	10	10	10	
9	2	2	2	2		2	2	2	2	
10	0	0	0	0		2	2	2	2	
11	0	0	0	0		8	8	8	8	
12	1	1	1	1		9	9	9	9	
OVERALL	16.7%	17.5%	17.5%	17.7%		23.9%	24.1%	25.3%	25.5%	

Sources: RECAP Model
Notes: