RECAP

The Retail Capacity forecasting Model

Project:	**Canterbury Retail Study 2010**	Number:	106Y4200
Client:	Canterbury City Council		
Date of Latest Revision:	30-Mar-11	File:	Canterbury RECAP Model 2010

Retail Locations Modelled:

- Canterbury City Centre
- Non-central Stores in Canterbury

Scenarios Modelled:

1a	Baseline' - Market shares indicated by the Household Interview Survey 2010 remain unchanged throughout the forecasting period.
2a	Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New Development

Notes:

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year 2010	Forecasting Years 2016	2021	2026	
1		44,200	46,004	46,671	47,829	
2		12,681	12,518	12,438	12,491	
3		7,814	7,659	7,629	7,680	
4		8,865	8,733	8,661	8,686	
5		38,330	38,245	38,684	39,537	
6		31,942	32,287	32,467	33,000	
7		130,932	133,249	134,605	136,445	
8		13,367	13,889	14,072	14,437	
9		96,698	100,126	102,663	105,360	
10		79,034	79,419	79,954	80,992	
11		131,164	134,809	138,308	142,385	
12		78,857	91,982	99,710	107,593	
13		63,866	65,247	68,812	71,894	
14		318,325	329,919	340,127	350,554	
TOTAL		1,056,075	1,094,086	1,124,801	1,158,883	

Sources:

Canterbury City Council, Kent County Council & Pitney Bowes Ltd - Anysite Report, September 2010

Notes:

The Canterbury ward forecasts have been controlled to the Strategy-based 9,200 district level forecasts. Figures for 2010 have been derived by interpollating between 2006 & 2011 data.

Table: **2**

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year): 2008 — Price Basis (Year): 2008

Including Special Forms of Trading:

Convenience Goods (£): 1,889 — Comparison Goods (£): 3,123

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods: (2.7) % 2008 to 2009; 0.1 % 2009 to 2010; 0.4 %pa 2009 to 2016; 0.4 %pa 2009 to 2026

Comparison Goods: (0.3) % 2008 to 2009; 1.3 % 2009 to 2010; 3.7 %pa 2009 to 2016; 3.8 %pa 2009 to 2026

PER CAPITA EXPENDITURE IN	Convenience Goods (£)				Comparison Goods (£)			
	2010	2016	2021	2026	2010	2016	2021	2026
(Including SFT)	1,839.83	1,890.08	1,928.19	1,967.06	3,154.11	4,015.30	4,871.19	5,869.78
Deduction for SFT (%)	4.5	5.5	6.0	7.0	10.0	15.0	17.0	18.0
Excluding SFT	**1,757.04**	**1,786.13**	**1,812.50**	**1,829.37**	**2,838.70**	**3,413.01**	**4,043.09**	**4,813.22**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2008

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT (£)	687	281	109	115	345	277	445	864	3,123

Per Capita Comparison Goods Expenditure in 2010

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT	693.84	283.80	110.09	116.15	348.44	279.76	449.43	872.61	3,154.11
Deduction for SFT (%)	8.0	4.5	10.0	12.0	25.0	6.0	3.0	12.0	10.0
Excluding SFT (£)	638.34	271.03	99.08	102.21	261.33	262.97	435.95	767.89	2,838.70

Sources:

Pitney Bowes 'Anysite Report' for the catchment area, September 2010. Pitney Bowes/Oxford Economics 'Retail Expenditure Guide 2010/11'.
DTZ estimates for SFT based on 'UK e-retail 2009', Verdict Research Limited.

Notes:

Growth projections apply the Oxford Economics forecasts up to 2020; followed by the 2009 to 2020 forecasts for the period 2020 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	77,661	82,169	84,591	87,497	125,470	157,012	188,695	230,212
2	22,281	22,359	22,544	22,851	35,998	42,724	50,288	60,122
3	13,730	13,680	13,828	14,050	22,182	26,140	30,845	36,966
4	15,576	15,598	15,698	15,890	25,165	29,806	35,017	41,808
5	67,347	68,310	70,115	72,328	108,807	130,531	156,403	190,300
6	56,123	57,669	58,846	60,369	90,674	110,196	131,267	158,836
7	230,053	238,000	243,971	249,608	371,676	454,780	544,220	656,740
8	23,486	24,808	25,505	26,411	37,945	47,403	56,894	69,489
9	169,902	178,838	186,076	192,742	274,496	341,731	415,076	507,121
10	138,866	141,853	144,916	148,164	224,354	271,058	323,261	389,833
11	230,461	240,786	250,683	260,474	372,335	460,104	559,192	685,331
12	138,555	164,292	180,724	196,827	223,851	313,935	403,137	517,869
13	112,215	116,539	124,722	131,521	181,296	222,689	278,213	346,042
14	559,311	589,278	616,479	641,292	903,628	1,126,016	1,375,164	1,687,295
TOTALS	1,855,569	1,954,178	2,038,698	2,120,022	2,997,877	3,734,125	4,547,672	5,577,963

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2010

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	28,214	11,979	4,379	4,518	11,551	11,623	19,269	33,941
2	8,095	3,437	1,256	1,296	3,314	3,335	5,528	9,738
3	4,988	2,118	774	799	2,042	2,055	3,407	6,000
4	5,659	2,403	878	906	2,317	2,331	3,865	6,807
5	24,467	10,389	3,798	3,918	10,017	10,080	16,710	29,433
6	20,390	8,657	3,165	3,265	8,347	8,400	13,925	24,528
7	83,579	35,486	12,972	13,382	34,216	34,432	57,080	100,542
8	8,533	3,623	1,324	1,366	3,493	3,515	5,827	10,264
9	61,726	26,208	9,581	9,883	25,270	25,429	42,155	74,254
10	50,450	21,420	7,830	8,078	20,654	20,784	34,455	60,690
11	83,727	35,549	12,995	13,406	34,277	34,493	57,181	100,720
12	50,337	21,372	7,813	8,060	20,607	20,737	34,378	60,554
13	40,768	17,309	6,328	6,528	16,690	16,795	27,842	49,042
14	203,198	86,275	31,539	32,535	83,187	83,711	138,774	244,440
TOTALS	674,130	286,226	104,633	107,939	275,981	277,720	460,396	810,953

Sources: RECAP Tables 1 and 2

Scenario 1a

Canterbury City Centre

Table: 5

CONVENIENCE GOODS MARKET SHARES IN 2010

2010 Allocations to

Canterbury City Centre

Indicated by household interview survey

Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	13.3	30.1	17.5
2	8.9	25.9	13.1
3	7.9	22.5	11.5
4	2.1	14.3	5.1
5	3.0	0.0	2.3
6	2.0	3.4	2.4
7	1.0	0.0	0.8
8	0.0	7.9	2.0
9	2.0	2.5	2.1
10	3.2	2.3	3.0
11	0.0	3.6	0.9
12	0.0	2.3	0.6
13	0.0	0.0	0.0
14	0.0	0.0	0.0

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

Table: 6

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2010

2010 Allocations to

Canterbury City Centre

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								
	638.34	271.03	99.08	102.21	261.33	262.97	435.95	767.89	2,838.79
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	78.3	33.3	46.5	25.6	22.6	19.6	59.5	78.1	57.5
2	76.8	39.2	52.3	36.5	32.9	14.9	55.2	78.5	58.3
3	81.8	36.0	44.4	28.2	21.9	19.6	54.3	77.1	57.4
4	68.1	35.4	29.5	12.7	14.7	8.4	34.4	73.0	47.3
5	49.0	32.9	33.3	18.5	23.9	1.1	12.2	52.5	34.4
6	70.8	41.5	54.1	26.6	21.3	1.1	15.3	50.7	40.9
7	15.2	15.7	8.0	1.1	5.0	0.0	7.2	18.9	11.9
8	35.5	26.3	23.8	7.1	11.4	2.3	13.8	39.5	25.6
9	47.8	33.3	42.5	13.8	15.3	0.0	8.4	50.0	32.1
10	43.2	16.7	27.0	3.7	1.3	1.1	5.1	23.4	19.7
11	33.3	18.1	19.0	8.5	6.4	3.3	5.4	31.4	20.4
12	21.6	11.3	18.2	2.4	0.0	1.1	5.1	17.1	12.2
13	9.1	6.3	8.9	0.0	0.0	0.0	3.2	6.3	5.2
14	3.2	0.0	0.0	0.0	0.0	0.0	1.1	3.7	1.9

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

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1a Location: **Canterbury City 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: 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	17	17	17	17	52	52	52	52
2	13	13	13	13	52	52	52	52
3	12	12	12	12	52	52	52	52
4	5	5	5	5	43	43	43	43
5	2	2	2	2	31	31	31	31
6	2	2	2	2	37	37	37	37
7	1	1	1	1	11	11	11	11
8	2	2	2	2	23	23	23	23
9	2	2	2	2	29	29	29	29
10	3	3	3	3	18	18	18	18
11	1	1	1	1	18	18	18	18
12	1	1	1	1	11	11	11	11
13	0	0	0	0	5	5	5	5
14	0	0	0	0	2	2	2	2

Sources: RECAP Model.
DTZ for market share corrections.

Table: 8

COMPARISON GOODS SALES BY GOODS TYPE IN 2010

Catchment Zones	2010 Sales in Canterbury City Centre 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	19,883	3,590	1,833	1,041	2,349	2,050	10,319	23,857
2	5,595	1,213	591	426	981	447	2,746	6,880
3	3,672	686	309	203	402	362	1,665	4,164
4	3,468	765	233	104	306	176	1,197	4,472
5	10,790	3,076	1,138	652	2,155	100	1,835	13,907
6	12,992	3,233	1,541	782	1,600	83	1,917	11,192
7	11,434	5,014	934	132	1,540	0	3,699	17,102
8	2,726	858	284	87	358	73	724	3,649
9	26,554	7,854	3,665	1,228	3,480	0	3,187	33,414
10	19,615	3,219	1,903	269	242	206	1,581	12,781
11	25,093	5,791	2,222	1,026	1,974	1,024	2,779	28,463
12	9,786	2,174	1,280	174	0	205	1,578	9,319
13	3,339	981	507	0	0	0	802	2,781
14	5,852	0	0	0	0	0	1,374	8,140
TOTALS	160,799	38,456	16,440	6,123	15,388	4,727	35,402	180,122
MARKET SHARES	23.9%	13.4%	15.7%	5.7%	5.6%	1.7%	7.7%	22.2%

Sources: RECAP Model.

Table: 9

FORECAST RETAIL SALES

Scenario: 1a Location: **Canterbury City 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 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	13,202	13,969	14,380	14,874	65,245	81,646	98,121	119,710
2	2,897	2,907	2,931	2,971	18,719	22,217	26,150	31,263
3	1,648	1,642	1,659	1,686	11,534	13,593	16,039	19,222
4	779	780	785	794	10,821	12,816	15,057	17,977
5	1,347	1,366	1,402	1,447	33,730	40,464	48,485	58,993
6	1,122	1,153	1,177	1,207	33,549	40,772	48,569	58,769
7	2,301	2,380	2,440	2,496	40,884	50,026	59,864	72,241
8	470	496	510	528	8,727	10,903	13,086	15,982
9	3,398	3,577	3,722	3,855	79,604	99,102	120,372	147,065
10	4,166	4,256	4,347	4,445	40,384	48,790	58,187	70,170
11	2,305	2,408	2,507	2,605	67,020	82,819	100,655	123,360
12	1,386	1,643	1,807	1,968	24,624	34,533	44,345	56,966
13	0	0	0	0	9,065	11,134	13,911	17,302
14	0	0	0	0	18,073	22,520	27,503	33,746
TOTALS	35,019	36,576	37,668	38,876	461,979	571,336	690,344	842,767

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)
Tesco Metro, Whitefriars Shopping Centre (Gravel Walk), Canterbury City Centre	1,457	63	918	12,787	11,737
Netto, St Georges Place, Canterbury City Centre	545	81	441	6,751	2,980
Aldi, St Georges Place, Canterbury City Centre	1,069	67	716	6,699	4,798
Marks and Spencer, St Georges Street, Canterbury City Centre	1,117	93	1,039	10,251	10,649
Other convenience outlets	1,442	95	1,370	5,000	6,850
ALL STORES	5,630		4,484	8,254	37,014

Sources: IGD, Kent County Council, Experian 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)
41, St Georges Place - redevelopment of site with loss of retail	- 850	85	- 723	7,000	- 5,058
ALL STORES	- 850		- 723	7,000	- 5,058

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
41, St Georges Place - redevelopment of site with loss of retail	- 850	85	- 723	6,000	- 4,335
Hallets Garage, St Dunstan Street - redevelopment of site	518	85	440	6,000	2,642
ALL STORES AND SCHEMES	- 332		- 282	6,000	- 1,693

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

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1a Location: **Canterbury City 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 2010 Comparison Goods: 1.50 % pa 2010 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	35,019	36,576	37,668	38,876		461,979	571,336	690,344	842,767	
Plus visitors' spending (%)	5.0	5.0	5.0	5.0		5.0	5.0	5.0	5.0	
Total spending (£000)	36,770	38,405	39,551	40,820		485,078	599,903	724,861	884,906	
Existing shop floorspace (sq m net)	4,484	4,484	4,484	4,484		77,433	77,433	77,433	77,433	
Sales per sq m net (£)	8,200	8,254	8,254	8,254		6,264	6,850	7,379	7,950	
Sales from extg flrspce (£000)	36,770	37,014	37,014	37,014		485,078	530,405	571,397	615,557	
Available spending to support new shops (£000)	0	1,391	2,537	3,806		0	69,498	153,464	269,349	
Less sales capacity of committed new floorspace (£000)	0	(5,058)	(5,058)	(5,058)		0	(1,693)	(1,824)	(1,965)	
Net available spending for new shops (£000)	0	6,448	7,594	8,864		0	71,191	155,288	271,314	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		6,000	6,561	7,068	7,614	
Capacity for new shop flrspc (sq m net)	**0**	**537**	**633**	**739**		**0**	**10,851**	**21,972**	**35,634**	

Market Share of Catchment Area Expenditure	1.9%	1.9%	1.8%	1.8%		15.4%	15.3%	15.2%	15.1%	

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

Notes: Excludes floorspace vacant at the time of the Household Interview Survey

Scenario	1a
Non-central Stores in Canterbury	

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2010

2010	Allocations to		
Non-central Stores in Canterbury			
Indicated by household interview survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q2	Q5	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	80.0	44.5	71.1
2	66.6	40.0	60.0
3	82.0	28.1	68.5
4	85.6	40.4	74.3
5	10.1	3.3	8.4
6	7.1	2.3	5.9
7	0.0	0.0	0.0
8	25.3	2.2	19.5
9	3.0	3.7	3.2
10	3.2	2.3	3.0
11	5.1	0.0	3.8
12	1.0	0.0	0.8
13	0.0	0.0	0.0
14	0.0	0.0	0.0

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

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2010

	2010 Allocations to								
	Non-central Stores in Canterbury								
	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								
	638.34	271.03	99.08	102.21	261.33	262.97	435.95	767.89	2,838.79
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	7.6	52.4	43.2	67.7	70.7	77.2	33.3	13.9	33.2
2	3.2	41.9	39.8	58.1	57.0	71.3	29.2	6.3	26.2
3	3.4	50.7	46.9	66.7	71.1	73.9	28.3	10.0	30.1
4	13.8	50.6	59.1	79.7	77.3	83.2	58.3	13.5	40.3
5	4.1	25.3	22.2	46.7	41.3	21.1	1.0	7.5	13.7
6	3.1	23.2	21.2	45.6	53.3	17.6	1.0	2.7	12.7
7	0.0	6.0	1.1	2.3	1.3	2.2	0.0	0.0	1.0
8	1.1	23.8	23.8	26.2	24.1	32.2	10.6	3.9	12.2
9	2.2	28.4	21.3	23.8	27.8	7.5	2.1	0.0	8.4
10	1.1	10.1	5.4	2.4	3.8	2.2	0.0	0.0	2.0
11	2.2	13.9	10.1	11.0	14.1	10.0	4.3	1.4	5.8
12	0.0	6.3	11.4	3.7	3.6	2.1	2.0	0.0	2.0
13	1.1	8.8	7.6	0.0	0.0	2.3	0.0	0.0	1.6
14	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1

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

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1a Location: **Non-central Stores in Canterbury**

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: 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	71	71	71	71	33	33	33	33
2	60	60	60	60	26	26	26	26
3	69	69	69	69	30	30	30	30
4	74	74	74	74	40	40	40	40
5	8	8	8	8	14	14	14	14
6	6	6	6	6	13	13	13	13
7	0	0	0	0	1	1	1	1
8	20	20	20	20	12	12	12	12
9	3	3	3	3	8	8	8	8
10	3	3	3	3	2	2	2	2
11	4	4	4	4	6	6	6	6
12	1	1	1	1	2	2	2	2
13	0	0	0	0	2	2	2	2
14	0	0	0	0	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 **Non-central Stores in Canterbury** 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	2,144	6,275	1,894	3,058	8,170	8,978	6,422	4,718
2	256	1,440	500	753	1,888	2,377	1,612	615
3	170	1,073	363	532	1,452	1,519	963	600
4	783	1,216	519	723	1,791	1,938	2,254	920
5	998	2,628	844	1,831	4,137	2,127	170	2,208
6	638	2,006	670	1,487	4,452	1,477	142	652
7	0	2,136	149	306	428	754	0	0
8	92	860	315	358	840	1,131	619	404
9	1,339	7,440	2,036	2,347	7,017	1,915	885	0
10	573	2,170	423	196	783	451	0	0
11	1,859	4,934	1,315	1,471	4,833	3,449	2,482	1,430
12	0	1,336	888	298	744	435	701	0
13	463	1,515	480	0	0	378	0	0
14	0	1,035	0	0	0	0	0	0
TOTALS	9,315	36,064	10,395	13,360	36,535	26,929	16,251	11,548
MARKET SHARES	1.4%	12.6%	9.9%	12.4%	13.2%	9.7%	3.5%	1.4%

Sources: RECAP Model.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1a Location: **Non-central Stores in Canterbury**

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 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 2010 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	55,140	58,340	60,060	62,123	41,405	51,814	62,269	75,970
2	13,369	13,415	13,526	13,710	9,359	11,108	13,075	15,632
3	9,473	9,439	9,541	9,694	6,654	7,842	9,253	11,090
4	11,526	11,543	11,617	11,759	10,066	11,922	14,007	16,723
5	5,388	5,465	5,609	5,786	15,233	18,274	21,896	26,642
6	3,367	3,460	3,531	3,622	11,788	14,325	17,065	20,649
7	0	0	0	0	3,717	4,548	5,442	6,567
8	4,697	4,962	5,101	5,282	4,553	5,688	6,827	8,339
9	5,097	5,365	5,582	5,782	21,960	27,338	33,206	40,570
10	4,166	4,256	4,347	4,445	4,487	5,421	6,465	7,797
11	9,218	9,631	10,027	10,419	22,340	27,606	33,552	41,120
12	1,386	1,643	1,807	1,968	4,477	6,279	8,063	10,357
13	0	0	0	0	3,626	4,454	5,564	6,921
14	0	0	0	0	0	0	0	0
TOTALS	122,827	127,519	130,749	134,591	159,666	196,621	236,685	288,376

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)
Asda, Sturry Road, Canterbury	5,612	56	3,143	13,378	42,043
Sainsbury's, Kingsmead Road, Canterbury	3,174	71	2,254	12,228	27,556
Iceland, Maynard Road, Wincheap Industrial Estate, Canterbury	521	93	485	6,466	3,133
Morrisons, Perch Road, Riverside Retail Park, Canterbury	3,252	75	2,439	16,188	39,483
Lidl, Sturry Road Canterbury	738	78	576	4,789	2,757
ALL STORES	13,297		8,895	12,925	114,972

Sources: IGD, DTZ, KCC, Verdict Research.

Table: 19

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 85 % (unless otherwise indicated)	Date of sales densities:			2010
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2010 (£per sqm net)	Sales 2010 (£000)
Asda, Sturry Road, Canterbury	-	2,469	7,355	18,162
Sainsbury's, Kingsmead Road, Canterbury	-	920	7,575	6,972
Morrisons, Perch Road, Riverside Retail Park, Canterbury	-	813	7,379	5,999
Riverside Retail Park, Canterbury:				
Mothercare	1,497	1,272	2,687	3,419
Argos (1)	1,324	1,125	n/a	7,008
Carphone Warehouse	258	219	7,500	1,645
Boots	813	691	8,144	5,628
Staples(2)	884	751	1,630	1,224
Pets at Home	1,026	872	n/a	2,116
Pine and Things	1,000	750	1,500	1,125
Wincheap Retail and Industrial Estate, Canterbury:				
Homebase	3,035	2,580	1,227	3,165
Beds Direct (5)	1,461	1,242	1,500	1,863
Canterbury Beds (5)	509	432	1,500	649
Beds 4 Us (5)	806	685	1,500	1,028
Carpets 4 Less (5)	742	631	1,250	789
Scats Country	1,096	932	n/a	2,278
Laura Ashley	468	398	3,225	1,283
Nasons Furniture	2,432	2,067	2,000	4,134
Right Price Tiles	708	602	1,315	791
Topps Tiles	465	395	1,315	520
Tile Giant	564	479	1,315	630
Digital World (5)	1,562	1,328	2,000	2,656
Fabric Warehouse	699	594	1,500	891
Dreams	760	646	n/a	1,228
Mattress Mania (5)	364	309	1,500	464
Cathedral Beds (5)	809	687	1,500	1,031
Brewer and Sons (5)	1,281	1,089	1,500	1,633
Lewis Carpets (5)	131	112	1,250	139
Thanington, Wincheap Road, Canterbury:				
Carpetright	834	709	1,100	780
Dunelm Mill	3,886	3,303	2,327	7,686
Canterbury City Retail Park (of Sturry Road), Canterbury:				
Harveys	1,671	1,420	2,663	3,782
Currys/PC World (5)	2,153	1,830	6,235	11,409
Carpetright	1,330	1,131	1,100	1,244
Toys R Us Extra	2,553	2,170	2,472	5,364
Maybrook Retail Park, Canterbury:				
Halfords(3)	697	592	2,468	1,315
DW Sport	929			
Maplin	929	790	2,155	1,702
Stour Retail Park (off Sturry Road), Canterbury:				
Matalan	1,755	1,492	2,150	3,207
Peacocks	1,442	1,226	1,000	1,226
Sports Direct	1,372	1,166	2,150	2,507
TK Maxx	1,500	1,275	2,738	3,491
Marshwood Close (off Sturry Road), Canterbury:				
Argos	1,815	1,543	n/a	7,007
Paul Simon	2,335	1,985	n/a	993
Comet	1,213	1,031	7,171	7,394
Sturry Road, Canterbury:				
B&Q(4)	4,567	3,882	2,088	8,105
Jessops	145	123	n/a	1,256
Carphone Warehouse	153	130	n/a	2,305
Roper Road, Canterbury:				
Grahams	4,186	3,558	1,500	5,337
Lenleys	2,008	1,707	3,000	5,120
Broad Oak, Canterbury:				
Magnet	1,563	1,329	2,102	2,793
Chainstore Discount (5)	1,163	989	1,250	1,236
St Andrews Close, Canterbury:				
Habitat	2,526	2,147	1,910	4,101
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		60,619	**2,769**	167,832

Sources: Retail Rankings', Mintel, with VAT added for compatibility with expenditure.
DTZ. Verdict Research. Floorspace for retail warehouses derived from KCC survey data (2009).

Notes: Where no sales density is indicated, sales are based on average sales per outlet.
(1) Argos sales based on average sales per outlet.
(2) 50% of floorspace excluded as non-retail (i.e. trade) sales. This unit is also subject to a planning permission to allow the sale of discounted convenience goods - Ref. 09/1931/VAR.

(3) 1,732 sq m net sales area. However, 25% had been deducted to take account of Motor Parts & Acc Sales (non-retail).
(4) 23% of floorspace excluded as non-retail (i.e. trade) sales.
(5) 10% excluded as non-retail (i.e. Trade sales)

Table: **20**

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)
Unit 3, Ten Perch Lane, Riverside Retail Park (Ref. 09/1931/VAR)	604	81	489	6,751	3,303
M&S Simply Food - Maylord Retail Park, Sturry Road - this store opened after	704	93	655	10,251	6,712
the Household Interview Survey was undertaken.			-		-
ALL STORES	1,308		1,144	8,754	10,014
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 - ex Allied Carpets (Wincheap Retail Park)	494	85	420	3,500	1,470
Vacant retail warehouse - Simmonds Road (Wincheap Retail Park)	1,157	85	983	3,500	3,442
CA081028 - 23 Maynard Road c/u from A1 to distribution	- 1,050	85	- 893	3,500	- 3,124
ALL STORES AND SCHEMES	601		511	3,500	1,788

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

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1a Location: **Non-central Stores in Canterbury**

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 2010 Comparison Goods: 1.50 % pa 2010 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2010	2016	2021	2026		2010	2016	2021	2026	
Residents' Spending £000	122,827	127,519	130,749	134,591		159,666	196,621	236,685	288,376	
Plus visitors' spending (%)										
Total spending (£000)	122,827	127,519	130,749	134,591		159,666	196,621	236,685	288,376	
Existing shop floorspace (sq m net)	8,895	8,895	8,895	8,895		60,619	60,619	60,619	60,619	
Sales per sq m net (£)	13,808	12,925	12,925	12,925		2,634	3,027	3,261	3,513	
Sales from extg flrspce (£000)	122,827	114,972	114,972	114,972		159,666	183,515	197,698	212,976	
Available spending to support new shops (£000)	0	12,547	15,777	19,619		0	13,106	38,987	75,399	
Less sales capacity of committed new floorspace (£000)	0	10,014	10,014	10,014		0	1,788	1,926	2,075	
Net available spending for new shops (£000)	0	2,532	5,763	9,604		0	11,318	37,061	73,324	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		3,500	3,827	4,123	4,441	
Capacity for new shop flrspc (sq m net)	**0**	**211**	**480**	**800**		**0**	**2,957**	**8,989**	**16,509**	

Market Share of Catchment Area Expenditure	6.6%	6.5%	6.4%	6.3%		5.3%	5.3%	5.2%	5.2%	

Sources: RECAP Model.

Notes:

Scenario 2b

Canterbury City Centre

Table: **22**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2b Location: **Canterbury City Centre**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New Development

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			
	2010 (%)	2016 (%)	2021 (%)	2026 (%)	2010 (%)	2016 (%)	2021 (%)	2026 (%)
1	17	17	17	17	52	57	57	57
2	13	13	13	13	52	57	57	57
3	12	12	12	12	52	57	57	57
4	5	5	5	5	43	47	47	47
5	2	2	2	2	31	33	33	33
6	2	2	2	2	37	39	39	39
7	1	1	1	1	11	12	12	12
8	2	2	2	2	23	25	25	25
9	2	2	2	2	29	31	31	31
10	3	3	3	3	18	19	19	19
11	1	1	1	1	18	19	19	19
12	1	1	1	1	11	11	11	11
13	0	0	0	0	5	5	5	5
14	0	0	0	0	2	2	2	2

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **23**

FORECAST RETAIL SALES

Scenario: 2b Location: **Canterbury City Centre**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New 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	13,202	14,075	14,580	15,167	65,245	90,176	109,052	133,805
2	2,897	2,916	2,948	2,994	18,719	24,434	28,832	34,536
3	1,648	1,648	1,671	1,704	11,534	14,962	17,708	21,293
4	779	783	790	801	10,821	14,057	16,557	19,815
5	1,347	1,376	1,421	1,473	33,730	43,381	52,285	63,967
6	1,122	1,160	1,190	1,226	33,549	43,237	51,759	62,922
7	2,301	2,380	2,440	2,496	40,884	54,574	65,306	78,809
8	470	496	510	528	8,727	11,851	14,224	17,372
9	3,398	3,577	3,722	3,855	79,604	105,937	128,674	157,208
10	4,166	4,256	4,347	4,445	40,384	51,501	61,420	74,068
11	2,305	2,408	2,507	2,605	67,020	87,420	106,246	130,213
12	1,386	1,643	1,807	1,968	24,624	34,533	44,345	56,966
13	0	0	0	0	9,065	11,134	13,911	17,302
14	0	0	0	0	18,073	22,520	27,503	33,746
TOTALS	35,019	36,718	37,933	39,263	461,979	609,717	737,822	902,020

Sources: RECAP Model.

Table: **24**

FORECAST RETAIL CAPACITY

Scenario: 2b Location: **Canterbury City Centre**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New 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	35,019	36,718	37,933	39,263		461,979	609,717	737,822	902,020	
Plus visitors' spending (%)	5.0	5.0	5.0	5.0		5.0	5.0	5.0	5.0	
Total spending (£000)	36,770	38,554	39,829	41,226		485,078	640,203	774,713	947,121	
Existing shop floorspace (sq m net)	4,484	4,484	4,484	4,484		77,433	77,433	77,433	77,433	
Sales per sq m net (£)	8,200	8,254	8,254	8,254		6,264	6,850	7,379	7,950	
Sales from extg flrspce (£000)	36,770	37,014	37,014	37,014		485,078	530,405	571,397	615,557	
Available spending to support new shops (£000)	0	1,540	2,815	4,212		0	109,798	203,316	331,564	
Less sales capacity of committed new floorspace (£000)	0	(5,058)	(5,058)	(5,058)		0	(1,693)	(1,824)	(1,965)	
Net available spending for new shops (£000)	0	6,597	7,873	9,270		0	111,491	205,140	333,529	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		6,000	6,561	7,068	7,614	
Capacity for new shop flrspc (sq m net)	**0**	**550**	**656**	**772**		**0**	**16,994**	**29,025**	**43,805**	

Market Share of Catchment Area Expenditure	1.9%	1.9%	1.9%	1.8%		15.4%	16.3%	16.2%	16.1%	

Sources: RECAP Model.

Notes: Excludes floorspace vacant at the time of the Household Interview Survey

Scenario 2b

Non-central Stores in Canterbury

Table: **25**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2b Location: **Non-central Stores in Canterbury**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New Development

Market shares adjustment factors: Convenience Goods: 100 % 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	71	71	71	71	33	31	31	31
2	60	60	60	60	26	24	24	24
3	69	69	69	69	30	28	28	28
4	74	74	74	74	40	38	38	38
5	8	8	8	8	14	13	13	13
6	6	6	6	6	13	12	12	12
7	0	0	0	0	1	1	1	1
8	20	20	20	20	12	11	11	11
9	3	3	3	3	8	8	8	8
10	3	3	3	3	2	2	2	2
11	4	4	4	4	6	6	6	6
12	1	1	1	1	2	2	2	2
13	0	0	0	0	2	2	2	2
14	0	0	0	0	0	0	0	0

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **26**

FORECAST RETAIL SALES

Scenario: 2b Location: **Non-central Stores in Canterbury**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New 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	55,140	58,783	60,895	63,346	41,405	49,043	59,309	72,771
2	13,369	13,460	13,606	13,817	9,359	10,288	12,140	14,541
3	9,473	9,479	9,610	9,796	6,654	7,350	8,699	10,460
4	11,526	11,582	11,686	11,857	10,066	11,365	13,386	16,020
5	5,388	5,504	5,682	5,894	15,233	17,090	20,597	25,199
6	3,367	3,481	3,570	3,679	11,788	13,304	15,926	19,361
7	0	0	0	0	3,717	4,548	5,442	6,567
8	4,697	4,962	5,101	5,282	4,553	5,214	6,258	7,644
9	5,097	5,365	5,582	5,782	21,960	27,338	33,206	40,570
10	4,166	4,256	4,347	4,445	4,487	5,421	6,465	7,797
11	9,218	9,631	10,027	10,419	22,340	27,606	33,552	41,120
12	1,386	1,643	1,807	1,968	4,477	6,279	8,063	10,357
13	0	0	0	0	3,626	4,454	5,564	6,921
14	0	0	0	0	0	0	0	0
TOTALS	122,827	128,145	131,914	136,286	159,666	189,300	228,607	279,328

Sources: RECAP Model.

Table: **27**

FORECAST RETAIL CAPACITY

Scenario: 2b Location: **Non-central Stores in Canterbury**

Increase in Market Shares for Comparison Goods in Canterbury City Centre to Reflect Major New 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	122,827	128,145	131,914	136,286		159,666	189,300	228,607	279,328	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	122,827	128,145	131,914	136,286		159,666	189,300	228,607	279,328	
Existing shop floorspace (sq m net)	8,895	8,895	8,895	8,895		60,619	60,619	60,619	60,619	
Sales per sq m net (£)	13,808	12,925	12,925	12,925		2,634	3,027	3,261	3,513	
Sales from extg flrspce (£000)	122,827	114,972	114,972	114,972		159,666	183,515	197,698	212,976	
Available spending to support new shops (£000)	0	13,173	16,942	21,315		0	5,785	30,910	66,351	
Less sales capacity of committed new floorspace (£000)	0	10,014	10,014	10,014		0	1,788	1,926	2,075	
Net available spending for new shops (£000)	0	3,159	6,928	11,300		0	3,997	28,984	64,276	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		3,500	3,827	4,123	4,441	
Capacity for new shop flrspc (sq m net)	**0**	**263**	**577**	**942**		**0**	**1,044**	**7,030**	**14,472**	

Market Share of Catchment Area Expenditure	6.6%	6.6%	6.5%	6.4%		5.3%	5.1%	5.0%	5.0%	

Sources: RECAP Model.

Notes:

Total Market Shares

Table: **28**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2010

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
Canterbury City Centre	23.9%	13.4%	15.7%	5.7%	5.6%	1.7%	7.7%	22.2%
Non-central Stores in Canterbury	1.4%	12.6%	9.9%	12.4%	13.2%	9.7%	3.5%	1.4%
TOTALS CANTERBURY	**25.2%**	**26.0%**	**25.6%**	**18.0%**	**18.8%**	**11.4%**	**11.2%**	**23.6%**

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

Table: **29**
Scenario: **1b**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Canterbury

Catchment Zones	CONVENIENCE GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)		COMPARISON GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)	
1	88	88	88	88		85	85	85	85	
2	73	73	73	73		78	78	78	78	
3	81	81	81	81		82	82	82	82	
4	79	79	79	79		83	83	83	83	
5	10	10	10	10		45	45	45	45	
6	8	8	8	8		50	50	50	50	
7	1	1	1	1		12	12	12	12	
8	22	22	22	22		35	35	35	35	
9	5	5	5	5		37	37	37	37	
10	6	6	6	6		20	20	20	20	
11	5	5	5	5		24	24	24	24	
12	2	2	2	2		13	13	13	13	
13	0	0	0	0		7	7	7	7	
14	0	0	0	0		2	2	2	2	
OVERALL	8.5%	8.4%	8.3%	8.3%		20.7%	20.6%	20.5%	20.4%	

Sources: RECAP Model
Notes:

Table: **30**
Scenario: **2b**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Canterbury

Catchment Zones	CONVENIENCE GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)		COMPARISON GOODS 2010 (%)	2016 (%)	2021 (%)	2026 (%)	
1	88	88	88	88		85	88	88	88	
2	73	73	73	73		78	81	81	81	
3	81	81	81	81		82	85	85	85	
4	79	79	79	79		83	85	85	85	
5	10	10	10	10		45	46	46	46	
6	8	8	8	8		50	51	51	51	
7	1	1	1	1		12	13	13	13	
8	22	22	22	22		35	36	36	36	
9	5	5	5	5		37	39	39	39	
10	6	6	6	6		20	21	21	21	
11	5	5	5	5		24	25	25	25	
12	2	2	2	2		13	13	13	13	
OVERALL	8.5%	8.4%	8.3%	8.3%		20.7%	21.4%	21.2%	21.1%	

Sources: RECAP Model
Notes: