



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

Notes:

Catchment Area Population and Expenditure

Table: 1
CATCHMENT AREA POPULATION FORECASTS

| Zone | Postcode Sectors | Base Year | Forecasting Years | | |
|--------------|------------------|------------------|-------------------|------------------|------------------|
| | | 2010 | 2016 | 2021 | 2026 |
| 1 | | 44,200 | 46,353 | 47,320 | 48,771 |
| 2 | | 12,681 | 12,560 | 12,511 | 12,588 |
| 3 | | 7,814 | 7,691 | 7,684 | 7,761 |
| 4 | | 8,865 | 8,763 | 8,713 | 8,759 |
| 5 | | 38,330 | 38,517 | 39,188 | 40,272 |
| 6 | | 31,942 | 32,483 | 32,825 | 33,520 |
| 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 | 1,095,007 | 1,126,492 | 1,161,331 |

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 10,200 district level forecasts. Figures for 2010 have been derived by interpolating 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) 0.4 | % 2008 to 2009 %pa 2009 to 2026 | 0.1 | % 2009 to 2010 | 0.4 | %pa 2009 to 2016 | | |
| Comparison Goods: | (0.3) 3.8 | % 2008 to 2009 %pa 2009 to 2026 | 1.3 | % 2009 to 2010 | 3.7 | %pa 2009 to 2016 | | |
| 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/ floorcrgs etc | Household Textiles | Household Appliances | Audio-visual equipment | Hardware, DIY, garden prdcts | Chemists, medol & 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 | | | | | | | | | |
| 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 | 82,792 | 85,767 | 89,220 | 125,470 | 158,203 | 191,319 | 234,746 |
| 2 | 22,281 | 22,434 | 22,676 | 23,028 | 35,998 | 42,867 | 50,583 | 60,589 |
| 3 | 13,730 | 13,737 | 13,927 | 14,198 | 22,182 | 26,249 | 31,067 | 37,355 |
| 4 | 15,576 | 15,652 | 15,792 | 16,023 | 25,165 | 29,908 | 35,227 | 42,159 |
| 5 | 67,347 | 68,796 | 71,028 | 73,672 | 108,807 | 131,459 | 158,441 | 193,838 |
| 6 | 56,123 | 58,019 | 59,495 | 61,320 | 90,674 | 110,865 | 132,714 | 161,339 |
| 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 | 1,955,823 | 2,041,763 | 2,124,501 | 2,997,877 | 3,737,268 | 4,554,509 | 5,589,745 |

Sources: RECAP Tables 1 and 2

Table: 4

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2010

| Catchment Zone | Clothing & footwear (£000) | Furniture/ floorcrgs 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 1b

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 Q1 | Top-up convenience Q4 | WEIGHTED AVERAGE |
| | 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 Q5 | Furniture/ flocrvgs etc Q6 | Household Textiles Q7 | Household Appliances Q8 | Audio-visual equipment Q9 | Hardware, DIY, garden products Q10 | Chemists, medcl & beauty goods Q11 | All other comparison gds Q12 | WEIGHTED AVERAGE |
| | 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: 1b | | 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 | Sales in Canterbury City Centre | | | | | | | |
|-----------------|---------------------------------|---------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type. | | | | | | | |
| | Clothing & footwear (£000) | Furniture/ floorcrgs 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: | 1b | | 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 | | | | 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 | 82,266 | 99,486 | 122,068 |
| 2 | 2,897 | 2,916 | 2,948 | 2,994 | 18,719 | 22,291 | 26,303 | 31,506 |
| 3 | 1,648 | 1,648 | 1,671 | 1,704 | 11,534 | 13,650 | 16,155 | 19,425 |
| 4 | 779 | 783 | 790 | 801 | 10,821 | 12,861 | 15,148 | 18,128 |
| 5 | 1,347 | 1,376 | 1,421 | 1,473 | 33,730 | 40,752 | 49,117 | 60,090 |
| 6 | 1,122 | 1,160 | 1,190 | 1,226 | 33,549 | 41,020 | 49,104 | 59,696 |
| 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 | 36,718 | 37,933 | 39,263 | 461,979 | 572,666 | 693,235 | 847,744 |

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: | 1b | | | | 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 | 36,718 | 37,933 | 39,263 | 461,979 | 572,666 | 693,235 | 847,744 | | |
| 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 | 601,300 | 727,897 | 890,132 | | |
| 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 flrspace (£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 | 70,895 | 156,500 | 274,575 | | |
| 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 | 72,588 | 158,324 | 276,540 | | |
| 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 flrspace (sq m net) | 0 | 550 | 656 | 772 | 0 | 11,064 | 22,401 | 36,320 | | |
| Market Share of Catchment Area Expenditure | 1.9% | 1.9% | 1.9% | 1.8% | 15.4% | 15.3% | 15.2% | 15.2% | | |

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

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

Scenario 1b

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 | | | | | | | | | |
| Zones | Clothing & footwear | Furniture/ floorcrgs 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 | 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: | 1b | 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 | Sales in Non-central Stores in Canterbury | | | | | | | |
|-----------------|---|---------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type. | | | | | | | |
| | Clothing & footwear (£000) | Furniture/ floorcrgs 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: | 1b | | 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 | | | | 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 | 52,207 | 63,135 | 77,466 |
| 2 | 13,369 | 13,460 | 13,606 | 13,817 | 9,359 | 11,146 | 13,152 | 15,753 |
| 3 | 9,473 | 9,479 | 9,610 | 9,796 | 6,654 | 7,875 | 9,320 | 11,207 |
| 4 | 11,526 | 11,582 | 11,686 | 11,857 | 10,066 | 11,963 | 14,091 | 16,864 |
| 5 | 5,388 | 5,504 | 5,682 | 5,894 | 15,233 | 18,404 | 22,182 | 27,137 |
| 6 | 3,367 | 3,481 | 3,570 | 3,679 | 11,788 | 14,412 | 17,253 | 20,974 |
| 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 | 128,145 | 131,914 | 136,286 | 159,666 | 197,342 | 238,252 | 291,071 |

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 Flrspace (sq m) | Net Flrspace (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 | 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 the Household Interview Survey was undertaken. | 704 | 93 | 655 | 10,251 | 6,712 |
| | | | | | |
| | | | | | |
| 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: | 1b | | | | 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 | 128,145 | 131,914 | 136,286 | 159,666 | 197,342 | 238,252 | 291,071 | | | |
| Plus visitors' spending (%) | | | | | | | | | | | |
| Total spending (£000) | 122,827 | 128,145 | 131,914 | 136,286 | 159,666 | 197,342 | 238,252 | 291,071 | | | |
| 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 flrspace (£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 | 13,827 | 40,554 | 78,095 | | | |
| 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 | 12,039 | 38,628 | 76,020 | | | |
| 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 flrspace (sq m net) | 0 | 263 | 577 | 942 | 0 | 3,146 | 9,369 | 17,116 | | | |
| Market Share of Catchment Area Expenditure | 6.6% | 6.6% | 6.5% | 6.4% | 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 flrspace (£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 flrspace (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/ floorcrgs 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 | | | | COMPARISON GOODS | | | |
|-----------------|-------------------|-------------|-------------|-------------|------------------|--------------|--------------|--------------|
| | 2010 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 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 | | | | COMPARISON GOODS | | | |
|-----------------|-------------------|-------------|-------------|-------------|------------------|--------------|--------------|--------------|
| | 2010 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 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: