



Newhaven Retail Capacity Assessment

Re:Map

Comparison Goods Shopping Only, 2004 - 2016

11/01/2005

Baseline Capacity (Assumes no change in market share with increased productivity of 1%)

STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING (all monetary figures expressed in constant 2000 prices):

	2004	2008	2012	2016	CHANGE: 2004 - 2016	
					£m	%
CORE CATCHMENT						
- Population ⁽¹⁾	49,687	50,186	50,689	51,198		3.0%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£2,719	£3,132	£3,608	£4,156		53%
Total Spend £m	£135.1	£157.2	£182.9	£212.8		58%
OUTER CATCHMENT						
- Population ⁽¹⁾	247,257	249,739	252,246	254,778		3.0%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£2,791	£3,215	£3,704	£4,267		53%
Total Spend £m	£690.1	£803.0	£934.3	£1,087.1		58%
Total Population	296,944	299,925	302,935	305,976		3.0%
- TOTAL COMPARISON GOODS SPENDING: (£million)	£825.2	£960.2	£1,117.2	£1,299.9	£475	58%

NOTES:

(1) Year 2001 (base) population derived from MapInfo TargetPro system. Population projections based on 1991–2011 annualised estimate for Lewes District for the period 2001 to 2011 derived from East Sussex County Council <http://www.eastsussexcc.gov.uk/community/factsandfigures/keydata/keydatapopulation/lewes.htm>

(2) 2000 (base) expenditure derived from MapInfo TargetPro dataset. Projections based on "ultra long term" trend (3.6% p.a.), as set out in The Data Consultancy Information Brief 99/2.

(3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates. Assume 7.6% of total available spend is on mail order, vending machines, internet, etc.

STAGE 2:**TOWN CENTRE & OUT-OF-CENTRE COMPARISON FLOORSPACE** (net square metres):

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Existing Space ⁽¹⁾ :	3,770	3,770	3,770	3,770
Sub-Total	3,770	3,770	3,770	3,770
OTHER NEWHAVEN: OUT-OF-CENTRE RETAIL FLOORSPACE				
Existing Space ⁽²⁾ :	5,717	5,717	5,717	5,717
Sub-Total	5,717	5,717	5,717	5,717
TOTAL COMPARISON GOODS FLOORSPACE:	9,487	9,487	9,487	9,487

NOTES:

(1) Derived from Goad Summary Report for Newhaven (survey date 30/05/03). Assume net/gross floorspace ratio of 75% for town centre space.

(2) Derived from the Sussex Retail Study May 1996 and verified with Lewes District Council in terms of units currently in retail use. Assume net/gross floorspace ratio of 85% out of town centre space.



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STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend)

	2004	2008	2012	2016
CORE CATCHMENT				
NEWHAVEN TOWN CENTRE	3.68%	3.68%	3.68%	3.68%
NEWHAVEN OUT-OF-CENTRE	10.40%	10.40%	10.40%	10.40%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE	78.32%	78.32%	78.32%	78.32%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING	7.60%	7.60%	7.60%	7.60%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%
OUTER CATCHMENT				
NEWHAVEN TOWN CENTRE	0.57%	0.57%	0.57%	0.57%
NEWHAVEN OUT-OF-CENTRE	1.14%	1.14%	1.14%	1.14%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE	90.69%	90.69%	90.69%	90.69%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING	7.60%	7.60%	7.60%	7.60%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%

NOTES:

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside Newhaven)

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Trade Draw from Core Catchment	55%	55%	55%	55%
Trade Draw from Outer Catchment	43%	43%	43%	43%
Trade Draw from Elsewhere	2%	2%	2%	2%
TOTAL TRADE DRAW	100%	100%	100%	100%
NEWHAVEN OUT-OF-CENTRE				
Trade Draw from Core Catchment	62%	62%	62%	62%
Trade Draw from Outer Catchment	34%	34%	34%	34%
Trade Draw from Elsewhere	4%	4%	4%	4%
TOTAL TRADE DRAW	100%	100%	100%	100%

NOTES:

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STAGE 5: POTENTIAL COMPARISON GOODS TURNOVER (£ million):

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Turnover from Core Catchment	£5.0	£5.8	£6.7	£7.8
Turnover from Outer Catchment	£3.9	£4.6	£5.3	£6.2
Turnover from Elsewhere	£0.2	£0.2	£0.2	£0.3
TOTAL TURNOVER	£9.1	£10.6	£12.3	£14.3
NEWHAVEN OUT-OF-CENTRE				
Turnover from Core Catchment	£14.1	£16.3	£19.0	£22.1
Turnover from Outer Catchment	£7.9	£9.2	£10.7	£12.4
Turnover from Elsewhere	£0.9	£1.1	£1.2	£1.4
TOTAL TURNOVER	£22.8	£26.6	£30.9	£36.0

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		2004	2008	2012	2016	CHANGE: 2004 - 2016	
NEWHAVEN TOWN CENTRE	Square Metres	£2,409	£2,803	£3,261	£3,794	£1,385	57.5%
	Square Feet	£224	£260	£303	£352	£129	57.5%
NEWHAVEN OUT-OF-CENTRE	Square Metres	£3,995	£4,648	£5,409	£6,293	£2,298	57.5%
	Square Feet	£371	£432	£502	£585	£213	57.5%

NOTES: (1) Calculated by dividing potential comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

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STAGE 7a:

DERIVED FORECAST SALES

ASSUMES ANNUAL TURNOVER 'EFFICIENCY' GROWTH RATE OF:
ASSUMES ANNUAL TURNOVER 'EFFICIENCY' GROWTH RATE OF:

1.0%
0.0%

per annum
per annum

FOR TOWN CENTRE FLOORSPACE
FOR OUT OF TOWN FLOORSPACE

		2004	2008	2012	2016	CHANGE: 2004 - 2016	
NEWHAVEN TOWN CENTRE:	Derived Average Sales Density (sq.metres):	£2,409	£2,506	£2,608	£2,714	£305	12.7%
	Derived Comparison Goods Turnover (£ million):	£9.1	£9.4	£9.8	£10.2	£1	12.7%
NEWHAVEN OUT-OF-CENTRE	Derived Average Sales Density (sq.metres):	£3,995	£3,995	£3,995	£3,995	£0	0.0%
	Derived Comparison Goods Turnover (£ million):	£22.8	£22.8	£22.8	£22.8	£0	0.0%

NOTES:

- (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5).
(2) Figures in later years based on the base year with an allowance for annual growth as specified.

STAGE 7b:**COMPARISON GOODS FLOORSPACE CAPACITY:**

Assumes an annual growth 'efficiency' of:	1.0%	for town centre floorspace
Assumes an annual growth 'efficiency' of:	0.0%	for out-of-town (retail warehouse) floorspace
Assumes a net/gross floorspace ratio of:	75%	for town centre floorspace
Assumes a net/gross floorspace ratio of:	85%	for out-of-town floorspace

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE:				
SURPLUS EXPENDITURE (£ million) ⁽¹⁾ :	£0.00	£1.12	£2.46	£4.07
ASSUMED SALES DENSITY OF NEW FLOORSPACE (£ per sq m) ⁽²⁾ :	£2,409	£2,506	£2,608	£2,714
SUPPORTABLE NEW FLOORSPACE (net sq m) ⁽³⁾ :	0	400	900	1,500
COMMITTED TOWN CENTRE FLOORSPACE (net sq m):	0	0	0	0
SUPPORTABLE NEW FLOORSPACE LESS COMMITTED FLOORSPACE:	0	400	900	1,500
Gross floorspace equivalent:	0	500	1,200	2,000
NEWHAVEN OUT-OF-CENTRE				
SURPLUS EXPENDITURE (£ million) ⁽¹⁾ :	£0.00	£3.73	£8.08	£13.14
ASSUMED SALES DENSITY OF NEW FLOORSPACE (£ per sq m) ⁽²⁾ :	£3,995	£3,995	£3,995	£3,995
SUPPORTABLE NEW FLOORSPACE (net sq m) ⁽³⁾ :	0	900	2,000	3,300
COMMITTED TOWN CENTRE FLOORSPACE (net sq m):	0	0	0	0
SUPPORTABLE NEW FLOORSPACE LESS COMMITTED FLOORSPACE:	0	900	2,000	3,300
Gross floorspace equivalent:	0	1,100	2,400	3,900

NOTES:

- (1) Potential over-trading is potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7a).
- (2) Figures in later years based on the base year with an allowance for annual (productivity) growth (1%) as specified.
- (3) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace, to nearest 100 sq m.