



Newhaven Retail Capacity Assessment

Re:Map

Convenience Goods Shopping Only, 2004 - 2016

Baseline Capacity (assumes no change in market share)

11/01/2005

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

	2004	2008	2012	2016	CHANGE: 2004 - 2016 %	
CORE CATCHMENT						
- Population ⁽¹⁾	49,687	50,186	50,689	51,198		3.0%
- Average Convenience goods spending (£ per capita): (2) (3)	£1,475	£1,481	£1,487	£1,493		1%
Total Spend £m	£73.3	£74.3	£75.4	£76.4		4%
OUTER CATCHMENT						
- Population ⁽¹⁾	247,257	249,739	252,246	254,778		3.0%
- Average Convenience goods spending (£ per capita): (2) (3)	£1,487	£1,493	£1,499	£1,505		1%
Total Spend £m	£367.7	£372.8	£378.1	£383.4		4%
Total Population	296,944	299,925	302,935	305,976		3.0%
- TOTAL CONVENIENCE GOODS SPENDING:(£million)	£440.9	£447.1	£453.4	£459.8	£18.9	4%

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 (0.1% 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 3.2% of total available spend is on mail order, vending machines, internet, etc.

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

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Existing Space ⁽¹⁾ :	1,171	1,171	1,171	1,171
Sub-Total	1,171	1,171	1,171	1,171
OTHER NEWHAVEN: OUT-OF-CENTRE RETAIL FLOORSPACE				
Existing Space ⁽²⁾ :	3,400	3,400	3,400	3,400
Sub-Total	3,400	3,400	3,400	3,400
TOTAL Convenience GOODS FLOORSPACE:	4,571	4,571	4,571	4,571

NOTES:

(1) Derived from Goad Summary Report for Newhaven (survey date 30/05/03). Assume net/gross floorspace ratio of 70% for town centre space.

(2) Derived from the Sussex Retail Study May 1996. For out of centre figures the net figure is derived from details supplied by Lewes District Council as stated in Planning Application No. LW/03/0344, in relation to the redevelopment to the Sainsbury's store at The Drove.



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

	2004	2008	2012	2016
CORE CATCHMENT				
NEWHAVEN TOWN CENTRE	10.37%	10.37%	10.37%	10.37%
NEWHAVEN OUT-OF-CENTRE	24.61%	24.61%	24.61%	24.61%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE	61.82%	61.82%	61.82%	61.82%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING	3.20%	3.20%	3.20%	3.20%
TOTAL ESTIMATED MARKET SHARE:	100.00%	100.00%	100.00%	100.00%
OUTER CATCHMENT				
NEWHAVEN TOWN CENTRE	0.15%	0.15%	0.15%	0.15%
NEWHAVEN OUT-OF-CENTRE	1.49%	1.49%	1.49%	1.49%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE	95.16%	95.16%	95.16%	95.16%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING	3.20%	3.20%	3.20%	3.20%
TOTAL ESTIMATED MARKET SHARE:	100.0%	100.0%	100.0%	100.0%

NOTES:

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

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Trade Draw from Core Catchment	93%	93%	93%	93%
Trade Draw from Outer Catchment	7%	7%	7%	7%
Trade Draw from Elsewhere	0%	0%	0%	0%
TOTAL TRADE DRAW	100%	100%	100%	100%
NEWHAVEN OUT-OF-CENTRE				
Trade Draw from Core Catchment	77%	77%	77%	77%
Trade Draw from Outer Catchment	23%	23%	23%	23%
Trade Draw from Elsewhere	0%	0%	0%	0%
TOTAL TRADE DRAW	100%	100%	100%	100%

NOTES:

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

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE				
Turnover from Core Catchment	£7.6	£7.7	£7.8	£7.9
Turnover from Outer Catchment	£0.6	£0.6	£0.6	£0.6
Turnover from Elsewhere	£0.0	£0.0	£0.0	£0.0
TOTAL TURNOVER	£8.2	£8.3	£8.4	£8.5
NEWHAVEN OUT-OF-CENTRE				
Turnover from Core Catchment	£18.0	£18.3	£18.5	£18.8
Turnover from Outer Catchment	£5.5	£5.5	£5.6	£5.7
Turnover from Elsewhere	£0.0	£0.0	£0.0	£0.0
TOTAL TURNOVER	£23.5	£23.8	£24.2	£24.5

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

		2004	2008	2012	2016	CHANGE: 2004 - 2016
NEWHAVEN TOWN CENTRE	Square Metres	£6,975	£7,073	£7,173	£7,274	4.3%
	Square Feet	£648	£657	£666	£676	
NEWHAVEN OUT-OF-CENTRE	Square Metres	£6,912	£7,009	£7,108	£7,208	4.3%
	Square Feet	£642	£651	£660	£670	

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

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STAGE 7a:

DERIVED FORECAST SALES

ASSUMES ANNUAL TURNOVER 'EFFICIENCY' GROWTH RATE OF:

0.0%

per annum

FOR TOWN CENTRE FLOORSPACE

		2004	2008	2012	2016	CHANGE: 2004 - 2016	
NEWHAVEN TOWN CENTRE:	Derived Average Sales Density (sq.metres):	£6.975	£6.975	£6.975	£6.975	£0	0.0%
	Derived Convenience Goods Turnover (£ million):	£8.2	£8.2	£8.2	£8.2	£0	0.0%
NEWHAVEN OUT-OF-CENTRE	Derived Average Sales Density (sq.metres):	£6.912	£6.912	£6.912	£6.912	£0	0.0%
	Derived Convenience Goods Turnover (£ million):	£23.5	£23.5	£23.5	£23.5	£0	0.0%

NOTES:

(1) Calculated in the base year by dividing potential Convenience goods turnover (Stage 4) by Convenience 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:**CONVENIENCE GOODS FLOORSPACE CAPACITY:**

Assumes an annual growth 'efficiency' of: 0.0%
 Assumes a net/gross floorspace ratio of: 70% for town centre floorspace
 Assumes a net/gross floorspace ratio of: 80% for out-of-town floorspace

	2004	2008	2012	2016
NEWHAVEN TOWN CENTRE:				
SURPLUS EXPENDITURE (£ million) ⁽¹⁾ :	£0.00	£0.11	£0.23	£0.35
ASSUMED SALES DENSITY OF NEW FLOORSPACE (£ per sq m) ⁽²⁾ :	£6,975	£6,975	£6,975	£6,975
SUPPORTABLE NEW FLOORSPACE (net sq m) ⁽³⁾ :	0	0	0	100
COMMITTED TOWN CENTRE FLOORSPACE (net sq m):	0	0	0	0
SUPPORTABLE NEW FLOORSPACE LESS COMMITTED FLOORSPACE:	0	0	0	100
Gross floorspace equivalent:	0	0	0	100
NEWHAVEN OUT-OF-CENTRE				
SURPLUS EXPENDITURE (£ million) ⁽¹⁾ :	£0.00	£0.33	£0.67	£1.01
ASSUMED SALES DENSITY OF NEW FLOORSPACE (£ per sq m) ⁽²⁾ :	£6,912	£6,912	£6,912	£6,912
SUPPORTABLE NEW FLOORSPACE (net sq m) ⁽³⁾ :	0	0	100	100
COMMITTED TOWN CENTRE FLOORSPACE (net sq m):	0	0	0	0
SUPPORTABLE NEW FLOORSPACE LESS COMMITTED FLOORSPACE:	0	0	100	100
Gross floorspace equivalent:	0	0	100	100

NOTES:
 (1) Surplus Expenditure is potential Convenience goods turnover (Stage 5) minus derived Convenience goods turnover (Stage 7a).
 (2) Figures in later years based on the base year with an allowance for annual (productivity) growth (0%) as specified.
 (3) Supportable new floorspace calculated by dividing surplus expenditure by assumed sales density of new floorspace, to nearest 100 sq m.