

Appendix 1: Bulky Goods Unit Impact Assessment (Sensitivity Assessment)

Table A: Zonal Draw to Proposed Bulky Goods Unit (High Scenario - £4,500 per sqm) - 2021

Zone	Trade Draw	
	%	£M
7	2%	0.27
9	1%	0.14
10	5%	0.69
11	14%	1.92
12	7%	0.96
13	20%	2.74
14	24%	3.29
15	22%	3.02
Outside Study Area	5%	0.69
Total	100%	13.71

Table B: Comparison trade Diversion to Proposed Bulky Goods Units 2021

Centre/Facility	Zone 7		Zone 9		Zone 10		Zone 11		Zone 12		Zone 13		Zone 14		Zone 15		Total
	%	£M	%	£M	%	£M	%	£M	%	£M	%	£M	%	£M	%	£M	£M
Inside Study Area																	
Arundel	0%	0	1%	0.00	2%	0.01	0%	0	0%	0	0%	0	0%	0	0%	0	0.02
Littlehampton TC	6%	0.02	2%	0.00	5%	0.03	0%	0	2%	0.02	10%	0.27	4%	0.13	3%	0.09	0.57
Littlehampton Other	21%	0.06	7%	0.01	25%	0.17	1%	0.02	7%	0.07	36%	0.99	30%	0.99	15%	0.45	2.75
Rustington	0%	0.00	0%	0.00	1%	0.01	0%	0.00	3%	0.03	1%	0.03	4%	0.13	3%	0.09	0.29
Ferring	0%	0.00	0%	0.00	0%	0.00	1%	0.02	2%	0.02	0%	0.00	1%	0.03	0%	0.00	0.07
Arun Elsewhere	1%	0.00	3%	0.00	2%	0.01	2%	0.04	6%	0.06	6%	0.16	11%	0.36	13%	0.39	1.04
Worthing TC	2%	0.01	1%	0.00	4%	0.03	36%	0.69	36%	0.35	16%	0.44	15%	0.49	16%	0.48	2.49
Outside Study Area																	
Bognor Regis TC	5%	0.01	4%	0.01	3%	0.02	0%	0.00	0%	0.00	2%	0.05	1%	0.03	1%	0.03	0.16
Bognor Regis Other	22%	0.06	18%	0.02	4%	0.03	0%	0.00	0%	0.00	9%	0.25	2%	0.07	3%	0.09	0.52
Chichester TC	25%	0.07	33%	0.05	23%	0.16	1%	0.02	5%	0.05	6%	0.16	5%	0.16	8%	0.24	0.91
Chichester other	10%	0.03	27%	0.04	24%	0.16	2%	0.04	0%	0.00	5%	0.14	2%	0.07	3%	0.09	0.56
Worthing other	1%	0.00	0%	0.00	2%	0.01	46%	0.88	28%	0.27	4%	0.11	14%	0.46	26%	0.78	2.52
Holmbush/Shoreham	0%	0.00	0%	0.00	0%	0.00	0%	0.00	1%	0.01	0%	0.00	1%	0.03	0%	0.00	0.04
Elsewhere	7%	0.02	4%	0.01	5%	0.03	11%	0.21	10%	0.10	5%	0.14	10%	0.33	9%	0.27	1.10
Total	100%	0.27	100%	0.14	100%	0.69	100%	1.92	100%	0.96	100%	2.74	100%	3.29	100%	3.02	13.02

Arun Elsewhere' - includes Rustington Retail Parks

Table C: Trade Draw of Comparison Goods Retail Commitments on Town Centres

Centre	Trade Diversion £M (2018)			Diversion 2021 £M
	Manor RP	Other *	Total	
Littlehampton	0.64	1.31	1.95	2.06
Rustington	0.53	1.61	2.14	2.26
Total	1.17	2.91	4.08	4.32

* Sainsbury's Redevelopment (R/59/12), Littlehampton Covered Market (LU/517/04) & Morrison's (LU/271/11)

2014 Prices - converted from 2011 prices used Experian Retail Planner Briefing Note 13 (October 2015) to ensure consistency with Arun Retail Study 2016 Update

Levels of trade diversion derived from DWD Planning & Retail Assessment Addendum Feb 2015 - Table 14, Appendix A

2021 turnover derived by applying a floorspace productively effectively rates as per Table 4b, Experian Retail Planner Note 13

Table D: Impact of Bulky Goods Unit (High Scenario - £4,500 per sqm) - Comparison Goods Turnover Only 2021

Centre/Facility	Turnover £M		Diversion £M	Impact %
	2014 *	2021		
Inside Study Area				
Arundel	2.51	3.01	0.02	0.50%
Littlehampton TC	22.17	26.57	0.57	2.14%
Littlehampton Other	19.87	23.82	2.75	11.55%
Rustington	16.8	20.14	0.29	1.42%
Ferring	6.22	7.46	0.07	0.96%
Arun Elsewhere	1.29	1.55	1.04	66.95%
Worthing TC	141.39	169.46	2.49	1.47%
Outside Study Area				
Bognor Regis TC	58.95	70.65	0.16	0.22%
Bognor Regis Other	27.23	32.64	0.52	1.58%
Chichester TC	98.06	117.53	0.91	0.77%
Chichester other	13.59	16.29	0.56	3.44%
Worthing other	37.17	44.55	2.52	5.66%
Holmbush/Shoreham	6.5	7.79	0.04	0.55%
Elsewhere	46.33	55.53	1.10	1.99%
Total			13.02	

2014 prices

* 2014 Turnover derived from Arun Retail Study 2016 Update - Table 16, Appendix 2b

2021 turnover derived by application of floorspace productivity rates as per Experian Retail Planner Briefing Note 13, Table 4b

2021 does not include the effect of retail commitments

Arun Elsewhere turnover includes Rustington out of centre retail facilities which is not reflected in 2021 survey derived turnover

Study Area comprises Zones 7, 9, 10, 11, 12, 13, 14 & 15 of the Arun Retail Study 2016 Update, Appendix 1

Table E: Cumulative Impact - Comparison Goods Only (Bulky Goods Unit, High Scenario)

Centre	Turnover £M 2021	Trade Diversion £M			Impact %	% Attributable to Proposal	Turnover £M		
		Commitments	Proposal	Total			Post Diversion	2014	Difference
Littlehampton TC	26.57	2.06	0.57	2.63	9.9%	21.6%	23.94	22.17	1.77
Rustington TC	20.14	2.26	0.29	2.54	12.6%	11.2%	17.59	16.80	0.79
Total	46.71	4.32	0.85	5.17			41.53	38.97	2.56

Tables C & D combined