

Supplementary Retail Assessment

Proposed Business Park and Foodstore

Oldlands Farm, Bognor Regis

October 2008

Supplementary Retail Assessment

Oldlands Farm, Bognor Regis

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Appendix A: updated quantitative assessment

Appendix B: town centre sight lines

1. Introduction

- 1.1 The purpose of this supplementary retail assessment is to respond to matters raised by Arun District Council in its consideration of the planning application for an ASDA foodstore as part of the proposed mixed-use development at Oldlands Farm, Bognor Regis.
- 1.2 Specifically, these matters are set out in emails and correspondence from the Council that includes:
 - (a) Emails dated 2 September 2008 and matters raised at meetings;
 - (b) Initial submission by EDAW;
 - (c) Letter from Jonathan Baldock to EDAW dated 16 September 2008;
 - (d) Letter from Peacock and Smith on behalf of Wm Morrison Supermarket Plc dated 25 July 2008; and
 - (e) Letters from Arun District Council to Drivers Jonas LLP dated 24 September 2008 and 6 October 2008.
- 1.3 Each of the technical matters that are raised in (a) – (e) above are dealt with in the following sections:
 - Section 2 - quantitative need;
 - Section 3 - qualitative need;
 - Section 4 - retail impact;
 - Section 5 - sequential approach;
 - Section 6 - updated quantitative assessment; and
 - Section 7 - conclusions.
- 1.4 The updated quantitative assessment that has been updated is provided at Appendix 1.

2. Quantitative Need

- 2.1 A number of technical inputs and assumptions made in the quantitative need assessment have been challenged. Our response to each of these points is set out below. It is important to understand that a number of these points are inter-related, and where relevant, we have highlighted this.

Catchment area population

- 2.2 DTZ do not challenge the extent of the catchment area that is used. However, the population growth forecasts are challenged and it is asserted that that these are too optimistic, resulting in some over-estimation of growth in catchment area expenditure.
- 2.3 It is important to understand that the population estimates and forecast figures for each of the Council wards within the defined catchment area were provided by an independent data provider (Experian). Drivers Jonas did not manipulate the figures that were provided by Experian.
- 2.4 Population estimates are created by Experian using a wide variety of small area data sources to estimate and track household and population change over time, including 2001 Census results, Postal Address File (PAF), lifestyle data and Experian's UK Consumer Dynamics Database (UKCDD). The estimates that they provide are widely accepted.
- 2.5 The estimates take account of changing postal geography and are also calibrated to Local Authority District/Unitary Authority level (LAD/UA) targets based on the most recently available government household and population estimates and projections. These are updated annually to allow for changes in housing stock and population changes due to births, deaths, migration, and the ageing of the population.
- 2.6 Household and Population Estimates for all levels are consistent with the Joint Industry Committee for Population Standards (JICPOPs) Postal Sector and Administrative District (i.e. LAD and Unitary Authority (UA)) estimates. It is for all of these reasons that the population data provided by Experian is held to be robust and reliable.
- 2.7 DTZ suggest that because of the credit crunch and the out-migration of eastern European workers who have been resident in the UK, the population figures are an over estimate. We do not agree with this proposition.
- 2.8 First, it is difficult to robustly factor these into the projections. Second, migration is not reflected in the National Census statistics, so this form of migration is excluded from the projections in any event. Third, the projections are only until 2011, and therefore the possible effects of this are considered to be limited.
- 2.9 Therefore, no changes are proposed to the population projections.

Growth in per capita expenditure

- 2.10 DTZ consider that the growth rate for comparison goods expenditure per capita of 6% from 2006 to 2007, and 5.3% pa 2007 to 2011 is too high a rate of growth over the short term period because of deteriorating economic conditions. DTZ considers that the rate should be 1% or 2% per annum at most on comparison goods.
- 2.11 We consider there is some validity in the argument put forward by DTZ because since our study was drafted in late 2007, there is no doubt that analysts have been surprised at the scale of economic difficulties being experienced.
- 2.12 Therefore, we accept that almost a year later, the growth rates that we have applied are too high. However, we do not accept that the rate of growth will have slowed to the extent that DTZ propose, as there is no reported evidence of a collapse in retail sales to anything like the levels that are suggested.
- 2.13 We consider that in the comparison sector it is appropriate to apply the Experian recommended ultra long-term growth rate for comparison goods of 4.8% per annum. This reflects a slow down in the rate of spending, which in percentage terms is a significant reduction from 5.3%. We see no justification for reducing it to 1% or 2% as suggested.
- 2.14 In the convenience sector, DTZ also consider that the rate of growth that has been applied is too high. A growth rate of +0.8% per annum had been applied for the period 2007 to 2011, and it is suggested this might fall to zero.
- 2.15 As with the comparison sector, we accept that there is likely to be a slow down, and therefore a revised growth rate of +0.6% per annum has been applied. This is the Experian recommended ultra long-term growth rate for convenience goods. This is a lower rate than we have previously used and is consistent with our approach of a slow-down in retail sales, rather than a collapse which seems to be the scenario proposed by DTZ.

Deduction for expenditure on Special Forms of Trading

- 2.16 DTZ consider that insufficient deduction has been made for spending by Special Forms of Trading (SFT) in both the convenience and comparison capacity assessments. DTZ state that "*SFT accounts for expenditure other than in retail shops, and includes internet and other on-line shopping, catalogue and mail order retailing, party plan retailing, vending machines, and expenditure on goods bought from temporary market stalls. Of this, internet and other on-line shopping is now the largest component.*"
- 2.17 We confirm that a deduction to represent SFT, nowadays referred to by Experian as Retail Sales Not in Stores (RSNS), has been made in both assessments (at Tables 3a and 3b respectively).
- 2.18 The case advanced by DTZ has some merit and we have researched this further and concluded that additional allowance should be made in our assessments for internet shopping. This applies both to the convenience and the comparison analyses.
- 2.19 In the convenience sector, an allowance of 1.7% for RSNS has been made. DTZ's suggestion is that this should be as much as 5% by 2011 and we have derived a similar figure using the following method.

- 2.20 We have had regard to the results of the household survey which are that less than 1% of residents of the catchment area use the Internet for convenience shopping. This is below the national level recorded by Experian, and this suggests that it would be inappropriate to apply a figure based on the national position, which is what DTZ appear to be implying.
- 2.21 Therefore, we have added 1% to 1.7% to give a deduction at the base year of 2.7%. This has been allowed to increase at the same rate as Experian's national average projections to 5.3%.
- 2.22 A similar approach has been taken in the comparison sector and the rate increases to 14.8% per annum by 2011. This is significantly below the figure of 20% which DTZ suggest.
- 2.23 In amending the allowance for Internet shopping, we have been mindful of the advice from Experian that low case scenarios should be adopted on account of the high degree of uncertainty in projecting the uptake of new technology and this type of shopping behaviour.
- 2.24 We consider that these levels of increased allowance for Internet shopping are robust.

Benchmark rates of convenience goods turnover

- 2.25 DTZ consider that DJ has used incorrect net floorspace data and turnover data for several stores.
- 2.26 For the floorspace data, DTZ rely on IGD to show that we had underestimated the net sales area of the Morrisons store by 64 sq m. This is accepted and the revised figure will be used.
- 2.27 DTZ abandon the IGD data for the Tesco store at Shripney Road and prefer to use Valuation Office data, together with net to gross ratios taken from IGD. This method of mix and match is baffling and wrong. In studies submitted by Tesco's own consultants for extension of a store in Littlehampton, the net sales figure that we have used is applied. On the basis of IGD and Tesco's own recent endorsement of this information, we do not accept the revised figure proposed by DTZ.
- 2.28 It is important to note that IGD's data is updated annually and the figures that we applied in our capacity assessment have been taken from the 2008 version of the database which was published post the submission of the planning application.
- 2.29 DTZ highlight that some of 'benchmark' convenience goods sales densities applied by us in Table 6 are incorrect. DTZ have applied data that is more recent than the data we had used and is simply a reflection of more up-to-date information being available.
- 2.30 We agree with DTZ that more up-to-date information is now available and we have revised our quantitative analysis to allow for this. This is explained in Section 6.

Convenience goods capacity assessment

- 2.31 DTZ assert that a combination of revised net sales areas and different benchmark sales densities result in there being limited capacity and the Tesco store at Shripney Road trading at a normal level. However, our revised quantitative analysis still shows the Tesco store to be over-trading and that there is capacity for additional convenience goods floorspace, although we do accept that the amount of capacity is reduced.
- 2.32 A further matter raised by DTZ and Peacock and Smith concerns the extent to which leakage of expenditure would be likely to be clawed back. Our response to this is that:
- (a) Leakage from Zone 7 – leakage from this zone is finely balanced, however it is important to bear in mind that for residents of Yapton, travelling to the new ASDA store will be easy and convenient once the northern relief road is built. As this is the major settlement within Zone 7, we consider that a significant proportion of these residents would find an ASDA store at Oldlands Farm an accessible and credible alternative destination for main food shopping. We consider that the effect of the opening of the new relief road has been under-estimated.
 - (b) Leakage to ASDA at Havant – ASDA's own experience from other stores is that long distance leakage stops when a store is opened close by, and in this case, ASDA would expect to recover all of the trade that is leaking to its Havant store.
 - (c) Leakage from Bognor Regis to Littlehampton and Chichester – it is asserted that this would happen and that the proposed ASDA store would not have a material effect on this. We contest this on the basis that there is limited choice in quality main food shopping in Bognor Regis. We consider that a modern ASDA foodstore would provide genuine choice for residents of Bognor Regis and would mean that they no longer have to travel out of Bognor Regis for their main food shopping.
- 2.33 Having regard to all of these considerations, as well as the findings of our updated quantitative assessment in Section 6, we conclude that there is a robust need for additional convenience goods floorspace of a scale appropriate to support ASDA's proposal.

Comparison goods capacity assessment

- 2.34 Having regard to the adjustment for increased allowance for the effects of Internet shopping, we accept that the overall capacity for comparison goods floorspace has reduced. This is considered in Section 6.
- 2.35 It is not accepted that the reduction in available expenditure would make it *"significantly less likely that the town centre developments will be able to proceed"* and that they will be *"significantly delayed"* (paragraph 15).
- 2.36 The amount of expenditure required to support ASDA – some £10m from within the catchment area – will be supported by growth in expenditure, claw back of leakage and trade drawn from out of centre stores, such as the Tesco at Shripney Road.

3. Qualitative Need

Retail choice/competition and claw back

- 3.1 On the basis of the number of foodstores in Bognor Regis, DTZ contend that there is adequate choice and competition. We contest this and consider that the high market share achieved by Tesco is evidence of a lack of choice. The volume of leakage of expenditure to other centres for main food shopping trips is evidence of this.
- 3.2 DTZ assert that the Tesco store at Shripney Road is not overtrading. Our updated quantitative analysis demonstrates that it is.
- 3.3 DTZ assert that the potential for ASDA to claw back trade that is leaking from the catchment will be lower than forecast. Again, given the scale of leakage of main food shopping, it is reasonable to conclude that an ASDA store would deliver the level of choice and competition needed to reverse the existing patterns of leakage.
- 3.4 The proposition that this expenditure would need to be clawed back to the town centre is valid only in relation to comparison goods, and the role that an ASDA store would expect to play in the retail hierarchy of Bognor Regis is very different to the role of a strengthened town centre. They would not expect to be competing for the same market of expenditure that is leaking to Chichester Town Centre which Bognor Regis Town Centre would be expecting to claw back.
- 3.5 It is not accepted that the ASDA store would lead to higher levels of trade diversion from smaller stores, such as Iceland. These stores are already trading alongside Tesco and Morrisons, and so it is not realistic to anticipate significant levels of diversion to an ASDA store.

Job creation

- 3.6 As explained in a separate submission on employment creation, ASDA's own experience is that the reduction in employment hours arising from the opening of a new store is relatively modest.
- 3.7 Based on an indicative calculation for an existing ASDA store with a similar turnover to the Tesco store on Shripney Road, ASDA has calculated that there could be a loss of approximately 20-25% of colleague hours in the existing store as a result of a new store. This is because there are certain posts in store which are fixed – and not dependent on turnover, and others which are variable – and turnover sensitive. This would not equate to 20-25% of jobs. Due to flexible working practices this is likely to result in an adjustment to colleagues hours with very few job losses.
- 3.8 In 1999, an EDAW study concluded that superstore openings created rather than destroyed jobs. EDAW found that between 165 and 236 net jobs were created for each superstore opening. Following on from this, the Competition Commission's 2000 report on supermarkets comments that, overall, arguments asserting that increases in superstore numbers have damaged net retail employment levels remain unsubstantiated.

Regeneration

- 3.9 The regeneration benefits of the proposal are in the widest sense. Unfortunately, DTZ's assertions in relation to financial viability have not been shared with us, and therefore we are not able to comment further on their assertion that our assessment of the benefits to the local office market have been overstated.
- 3.10 Our initial response to this conclusion is that it appears to undermine the authority's ambitions to achieve a high quality business park on this site.
- 3.11 Overall, we consider that the qualitative case for the foodstore is robust.

4. Retail Impact

Trade diversion from Tesco and Morrisons

- 4.1 DTZ's main criticism is that the impact on Tesco at Shripney Road is too high and the impact on Morrisons in the town centre is too low.
- 4.2 The justification for this is that DTZ consider that Morrisons is closer to ASDA in terms of shopper perceptions and price levels than Tesco. This is clearly wrong and based on a simple misunderstanding of the state of the convenience sector.
- 4.3 Tesco and ASDA compete head-to-head. Morrisons do not compete with them to anything like the same degree and therefore it is reasonable to expect a significant variation in levels of trade diversion.
- 4.4 Significantly, the proposed ASDA store will be very close to the existing Tesco store, and therefore it is reasonable to expect that there would be much higher levels of trade diversion based on a simple gravity model analysis.
- 4.5 Taken together, we consider these factors support the much higher level of trade diversion from Tesco than Morrisons.

Impact on the town centre

- 4.6 DTZ assert a number of possible impacts :
 - (a) The decentralisation of the growth in expenditure and clawback to an out-of-centre ASDA would put the Council's town centre developments at risk – there is no evidence that a foodstore based scheme would harm St Modwen's proposals for the town centre, especially as these are residentially based;
 - (b) Highly likely to result in the prevention or delay of the proposed large scale new private sector investment in Bognor Regis Town Centre – there is no evidence to support this assertion. The delay in implementation of St Modwen's proposals has more to do with the problems in the residential market than the effect of ASDA's proposals;
 - (c) Undermine the vitality and viability of the town centre due to the impact on Morrisons – the alleged impact on Morrisons is not accepted, and in any event, diversion of trade from one store is not going to undermine the town centre as a whole.
 - (d) Reduce the range of services provided by the town centre as (nationally) the growth in superstores has been accompanied by significant decline in small convenience good shops – the reasons for the decline in the number of small convenience shops are too complex to make the link that this is because of supermarkets, and if DTZ are right that Bognor Regis is already spoilt for choice with supermarkets, surely the trade would already have been diverted from these stores?
 - (e) Increase in vacant properties in the secondary shopping area – no evidence is provided to support this assertion and it is wholly misleading. As noted already, shops in Bognor Regis are already trading with the large Tesco store at Shripney Road and the Morrisons in the town centre. There are no logical reasons why an

ASDA store at Oldlands Farm would lead to closure of stores in secondary locations and it is fallacious of DTZ to suggest that it would.

- (f) Serious adverse effect on the quality, attractiveness, physical condition and character of the town centre – there is no evidence from DTZ to support the proposition that the proposal would “be very likely to prevent or seriously delay” improvements in the town centre. There is no substance to this assertion.
 - (g) No adverse effect on the night-time economy – this is agreed.
- 4.7 DTZ's conclusion that the proposal would “fail most of the tests” is not supported by any evidence, only assertion and supposition.

5. Sequential Approach

- 5.1 The Planning and Retail Statement that accompanied the planning application identified a total of seven sites within or potentially on the edge of Bognor town centre.
- 5.2 We concluded that we are satisfied that five of the edge-of-centre sites do not pass the sequential tests of suitability, viability and availability, and a further two are actually out-of-centre (the land adjoining the railway station and the builders merchants on London Road). Hence we consider it is reasonable to promote land at Oldlands Farm for retail development to meet the identified need for a foodstore in Bognor Regis.
- 5.3 We understand that three sites are suggested by DTZ – including the out of centre Covers Builders Merchants – as being appropriate for convenience retail development in the town centre, although we dispute DTZ's suggestion that a need exists only for a small foodstore.
- 5.4 Our updated quantitative analysis demonstrates that the need exists for a large foodstore of the size proposed by ASDA.

Redevelopment by Wm Morrison

- 5.5 It is alleged that Wm Morrison could redevelop this site. We have nothing to add to our original submissions on the potential of this site, except to note that in their original letter of objection to the proposal, Wm Morrison do not indicate that this is a site that they are pursuing.
- 5.6 This confirms ASDA's view that this is not a credible or viable site for foodstore development.

Hothampton site

- 5.7 As noted, in the original proposal for mixed-use development of this site, there were no proposals for a foodstore. The potential for a foodstore was added at a later date.
- 5.8 It is significant that despite marketing of the opportunity, a leading convenience retailer has not committed to the site. This lack of interest has nothing to ASDA's proposals which DTZ may allege. It has more to do with the fact that it is a constrained site that is not suitable to meet the identified need for convenience retailing in Bognor Regis to compete with Tesco at Shripney Road and stem the leakage of trade to competing centres.

Covers Builders Merchants adjoining Bognor Regis Railway Station

- 5.9 It is suggested by the Council that there has been significant interest in this site from supermarket retailers and this is evidence of its suitability.
- 5.10 We have contacted the owners of the site who have confirmed that they have received significant unsolicited interest in the site from housebuilders. However, none of the offers have been high enough to sustain relocation of the business, and in the deteriorating economic climate, Covers expect to remain on the site for at least the next 5 years.
- 5.11 Covers have agreed to write to us on this matter and a copy of this letter will be sent to the Council.
- 5.12 In a practical sense, it would be difficult to position the entrance to a store in this right location. The scope for linkages with the town centre are also considered to be limited.

- 5.13 We contend that the absence of desire lines and sight lines, together with the requirement to cross busy roads to get to the site and walk around an existing built-up area, will mean that the site could not function effectively as an edge-of-centre store. See Appendix A.
- 5.14 In summary, in terms of retail policy guidance, there are not considered to be any sequentially preferable sites.

PPS25 Sequential Test

- 5.15 It is accepted by the Council that, having regard to the guidance in PPS25, there are no sequentially preferable sites available for the proposed business park uses. The Environment Agency has not objected to the proposed development of the business park on flood risk or environmental grounds.
- 5.16 The Council contends that there are several sites in the town centre that are sequentially preferable for the development of the supermarket, and it is on this basis that the Environment Agency is objecting to the retail element of the proposals. The Agency's objection in relation to the business park element has been withdrawn.
- 5.17 First, the Council's decision to disaggregate the uses is not accepted. Given that the proposed development constitutes enabling development, it cannot be right to separate out the uses and suggest that the business park should stay at Oldlands Farm and the foodstore could be in the town centre.
- 5.18 Second, all of the sites that the Council has suggested as being sequentially preferable sites in or on the edge of the town centre, fail one or more of the PPS 6 sequential approach tests of suitability, availability or viability and therefore can be rejected.
- 5.19 In summary, on retail policy and PPS25 grounds, all of the sequential sites can be rejected. We contend that because flood risk concerns relating to the proposed development of Phase 1 of Oldlands Farm have not been cited by the Environment Agency, and on account of the viability evidence and the need for enabling development, the Environment Agency's objection to the foodstore element of the proposed development should fall away.

6. Updated quantitative assessment

- 6.1 We have indicated that there are a number of adjustments that we consider should be made to our quantitative assessment.
- 6.2 These are explained below, before commentary is provided on the findings of the revised capacity and impact assessments.

Updated quantitative analysis

- 6.3 It is useful to highlight whether or not the tables in the analysis have changed:
- (i) Table 1 – the assessment years beyond 2012 have been removed.
 - (ii) Tables 2a and 2b – changed to allow different growth rates and to exclude SFT and Internet expenditure.
 - (iii) Tables 3a and 3b – changed to include higher rates of SFT and Internet shopping.
 - (iv) Tables 4a – 4d – no changes in the format, however the data has changed arising from changes to earlier tables.
 - (v) Table 5 – no change.
 - (vi) Table 6 – changed to allow for revised benchmark turnover estimates and larger floorspace in Wm Morrison.
 - (vii) Table 7 – no changes in the format, however the data has changed arising from changes to earlier tables.
 - (viii) Table 8 – no changes in the format, however the data has changed arising from changes to earlier tables.
 - (ix) Tables 9a and 9b – changes in the layout and the data has changed arising from changes to earlier tables.
 - (x) Table 10 – changes arising from revisions in benchmark turnover estimates.
 - (xi) Table 11 – changes arising from revisions in data.
 - (xii) Table 12 – changes arising from revisions in data.
 - (xiii) Table 13 – changes arising from revisions in data.
 - (xiv) Table 14 - changes arising from revisions in data.

- 6.4 The updated assessment is provided at Appendix 1.

Updated findings of the capacity analysis

- 6.5 The updated convenience analysis demonstrates that by 2011 there will be over-trading of some £12.0m and leakage of some £42.4m, which together is more than adequate to demonstrate a need for additional convenience goods floorspace.
- 6.6 The total turnover of the proposed ASDA foodstore having to be drawn from the catchment area is £34.3m, and so there is clear headroom within the economic model.

- 6.7 The updated comparison analysis shows that the surplus of expenditure has fallen sharply because of the increased effect of Internet spending on comparison goods.
- 6.8 The adjusted surplus in the comparison sector is some £25.6m with the forecast comparison turnover of the ASDA store of some £10.3m. It is accepted that the growth in available expenditure is much less, however the overall surplus of expenditure – even allowing for the commitments in the town centre which would be expecting to be supported by claws back of trade leaking to competing centres – is sufficient to support all of the commitments and the proposal.

Updated findings of the impact analysis

- 6.9 Using the latest benchmark turnover data, the turnover of the proposal actually falls slightly to £34.3m (Table 10).
- 6.10 This is reflected in the revised impact tables which are presented in Table 11. DTZ's assertions that the impact on Tesco should be lower and should be higher on Wm Morrison are not accepted, and therefore we have followed broadly the same approach. The comment in relation to the effect on current trading patterns in Zone 7 has been considered and an adjustment has been made.
- 6.11 Overall, the impact on the town centre is low and there is considered to be no harm arising to the town centre.

7. Conclusions

- 7.1 Our quantitative assessment has been updated to allow for more up-to-date information to be used on growth rates and benchmark turnovers and for an additional allowance to be made for Internet shopping.
- 7.2 The assessment demonstrates that the Tesco store at Shripney Road continues to overtrade and there remains capacity for additional convenience and comparison goods floorspace in Bognor Regis. Full allowance is made for existing commitments in the town centre.
- 7.3 The forecast levels of trade diversion will not undermine the town centre. Despite DTZ's assertions, there is no evidence of any harm occurring to the town centre that would undermine it.
- 7.4 There are no sequentially preferable sites in PPS6 or PPS25 terms. Wm Morrison have not expressed any interest in developing their existing site that the Council has inferred as being sequentially preferable. The Hothampton site remains unsuitable for a foodstore of the size needed in Bognor Regis and the Covers site fails the tests of viability and availability.

Drivers Jonas

October 2008



SUPPLEMENTARY RETAIL ASSESSMENT
OLDLANDS FARM, BOGNOR REGIS

Appendix A

Updated quantitative assessment

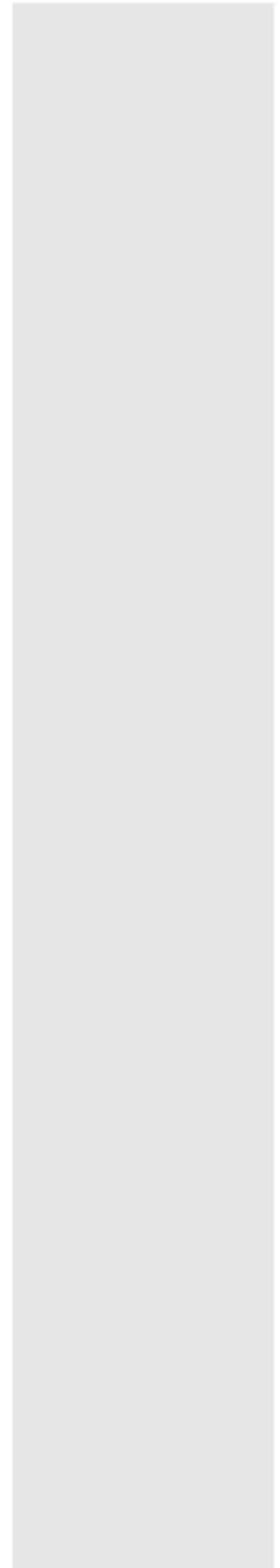


Table 1 - Population Projections by Survey Zone

		2006	2007	2009	2011
Zone 1	Pagham	7,445	7,484	7,580	7,645
Zone 2	Bersted	8,465	8,612	8,903	9,123
Zone 3	Aldwick East	4,669	4,711	4,811	4,859
	Aldwick West	4,715	4,732	4,791	4,817
Zone 4	Pevensey	5,760	5,833	6,026	6,172
	Orchard	6,235	6,340	6,545	6,690
	Hotham	5,888	5,907	6,087	6,151
	Marine	5,168	5,199	5,329	5,451
Zone 5	Felpham West	4,833	4,866	4,959	5,039
	Felpham East	4,999	5,049	5,152	5,215
Zone 6	Middleton	5,312	5,337	5,491	5,579
Zone 7	Yapton	5,880	5,974	6,179	6,360
Zone 8	Barnham	8,274	8,394	8,725	8,979
Zone 9	Walberton	2,785	2,835	2,919	3,015
Total		80,428	81,273	83,497	85,095

	2006-07	2006-09	2006-11
Total Population Growth	845	3,069	4,667
Total Population Growth (%)	1.05	3.82	5.80

Source/notes:

1. 2001 Census data.
2. Experian Study Area Population Report.
3. The design and PPS6 assessment year is 2011.

Table 2a - Convenience goods expenditure per capita

	2006 £	2007 £	2009 £	2011 £
Zone 1	1,730	1,748	1,769	1,790
Zone 2	1,611	1,627	1,646	1,666
Zone 3	1,679	1,696	1,716	1,737
Zone 4	1,793	1,811	1,833	1,855
	1,496	1,511	1,529	1,547
	1,462	1,476	1,494	1,512
	1,509	1,525	1,543	1,561
Zone 5	1,755	1,772	1,794	1,815
	1,776	1,794	1,815	1,837
	1,705	1,722	1,742	1,763
	1,800	1,818	1,840	1,862
Zone 6	1,554	1,570	1,588	1,608
Zone 7	1,705	1,722	1,743	1,764
Zone 8	1,928	1,947	1,971	1,995
Zone 9				

Source/notes:

1. Convenience goods comprises food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods (Experian definition).
2. 2006 local expenditure estimates for the total Study Area have been sourced from Experian.
3. Estimates to 2007 have been derived by growing the 2006 estimates by a rate of 1.0%pa (Experian Retail Planner Briefing Note 5.1).
4. Estimates for 2009-2011 have been derived by growing the 2007 estimates by a rate of 0.6%pa (Experian Retail Planner Briefing Note 5.1).
5. 2006 prices used throughout.
6. The design and PPS6 assessment year is 2011.

Table 2b - Core comparison goods expenditure per capita

	2006 £	2007 £	2009 £	2011 £
Zone 1	1,780	1,886	2,072	2,275
Zone 2	1,731	1,835	2,015	2,213
Zone 3	1,947	2,064	2,267	2,490
	1,798	1,906	2,093	2,299
Zone 4	1,543	1,636	1,797	1,973
	1,549	1,641	1,803	1,980
	1,674	1,775	1,949	2,141
	2,000	2,120	2,328	2,557
Zone 5	1,858	1,970	2,163	2,376
	1,866	1,978	2,172	2,386
Zone 6	1,974	2,093	2,298	2,524
Zone 7	1,715	1,818	1,997	2,193
Zone 8	1,908	2,023	2,222	2,440
Zone 9	2,086	2,211	2,428	2,667

Source/notes:

1. Experian's definition of comparison goods includes 10% of non-durable household goods.
2. 2006 local expenditure estimates for the total Study Area have been sourced from Experian.
3. Estimates for 2007 have been derived by growing the 2006 estimates by a rate of 6.0%pa (Experian Retail Planner Briefing Note 5.1).
4. Estimates for 2009-2015 have been derived by growing the 2007 estimates by a rate of 4.8%pa (Experian Retail Planner Briefing Note 5.1).
5. 2006 prices used throughout.
6. The design and PPS6 assessment year is 2011.

Table 3a - Convenience goods expenditure by zone (£m)

	2006	2007	2009	2011
Zone 1	£12.5	£12.6	£12.8	£13.0
Zone 2	£13.3	£13.5	£14.0	£14.4
Zone 3	£15.8	£15.9	£16.3	£16.5
Zone 4	£34.9	£35.3	£36.6	£37.6
Zone 5	£16.4	£16.5	£16.8	£17.2
Zone 6	£9.3	£9.4	£9.6	£9.8
Zone 7	£8.9	£9.0	£9.4	£9.7
Zone 8	£13.7	£13.9	£14.5	£15.0
Zone 9	£5.2	£5.3	£5.5	£5.7
Total	£130.0	£131.5	£135.5	£139.0

Source/notes:

1. Tables 1 and 2a.

2. The following deductions have been made to allow for Retail Sales not in Stores and internet shopping: 2.7% at 2006; 3.6% at 2007; 4.6% at 2009; and 5.3% at 2011.

Table 3b - Core comparison goods expenditure by zone (£m)

	2006	2007	2009	2011
Zone 1	£12.1	£12.6	£13.7	£14.9
Zone 2	£13.4	£14.1	£15.6	£17.3
Zone 3	£15.9	£16.6	£18.2	£20.0
Zone 4	£35.5	£37.2	£41.3	£45.9
Zone 5	£16.4	£17.1	£18.7	£20.6
Zone 6	£9.6	£9.9	£11.0	£12.1
Zone 7	£9.2	£9.7	£10.7	£12.0
Zone 8	£14.4	£15.1	£16.9	£18.8
Zone 9	£5.3	£5.6	£6.2	£6.9
Total	£131.8	£137.9	£152.3	£168.6

Source/notes:

1. Tables 1 and 2a.
2. The following deductions have been made to allow for Retail Sales not in Stores and internet shopping: 8.8% at 2006; 11.0% at 2007; 13.9% at 2009; and 14.1% at 2011.

Table 4a - Convenience market shares by Zone at 2007 - main food shopping

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Inside Catchment Area									
Morrison's - 30 Bedford Street	18.5%	14.0%	16.9%	22.8%	15.7%	7.9%	4.5%	2.0%	2.9%
Iceland - 111 Queensway	1.1%	0.9%	0.8%	1.8%	0.0%	0.0%	0.0%	1.0%	0.0%
Tesco Express - 15-17 Station Rd	3.3%	0.0%	5.1%	0.7%	0.0%	0.0%	0.0%	1.0%	0.0%
Total Bognor Regis Town Centre	22.8%	15.0%	22.9%	25.3%	15.7%	7.9%	4.5%	3.9%	2.9%
Lidl - Peel Centre Shripney	3.3%	2.8%	0.8%	0.7%	0.8%	4.8%	0.0%	0.0%	0.0%
Tesco - Shripney Road	41.3%	70.1%	50.0%	48.0%	47.1%	38.1%	9.0%	36.3%	35.3%
Co-Op - 68 Rose Green Road	3.3%	0.0%	0.8%	0.7%	0.0%	0.0%	1.5%	0.0%	0.0%
Tesco Express - 194-196 Pagham Road	2.2%	0.0%	0.0%	0.4%	0.0%	1.6%	0.0%	0.0%	0.0%
Co-Op - 53 Hawthorne Road	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express - Aldwick Road	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Others, Felpham	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Others, Yapton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
Others, Bognor Regis	0.0%	0.0%	1.7%	1.4%	1.7%	3.2%	1.5%	0.0%	0.0%
Others, Bamham	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	4.9%	5.9%
Others, Eastergate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others, Middleton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others, Westergate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Bognor Regis Non-Town Centre	50.0%	72.9%	53.4%	52.3%	50.4%	47.6%	12.0%	41.2%	44.1%
Total Study Area	72.8%	37.8%	76.3%	77.6%	56.1%	55.6%	16.5%	45.1%	47.0%
Sainsbury's - High Street	0.0%	0.0%	0.0%	0.4%	0.8%	3.2%	4.5%	1.0%	0.0%
Tesco - Broadpiece	0.0%	0.0%	0.0%	0.7%	20.7%	31.7%	56.7%	6.9%	2.9%
Somerfield - 97-117 Wick Street	0.0%	0.9%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%
Sainsbury's - New Road	0.0%	0.0%	0.0%	0.4%	1.7%	0.0%	1.5%	1.0%	0.0%
Others - Littlehampton	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Total Littlehampton	0.0%	0.9%	0.8%	1.4%	23.1%	36.5%	54.2%	3.8%	2.9%
Tesco - 35 South Street	5.4%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	4.9%	0.0%
Marks and Spencers - 16 East Street	1.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	1.0%	2.9%
Waitrose Via - Ravenna	1.1%	0.0%	4.2%	1.4%	3.3%	4.8%	3.0%	5.9%	5.9%
Sainsbury's - Westhampnett	15.2%	11.2%	15.3%	7.5%	5.0%	0.0%	11.9%	30.4%	35.3%
Tesco - Fishbourne Road	2.2%	0.0%	2.5%	0.4%	0.8%	0.0%	0.0%	0.0%	5.9%
Tesco - 7-8 East Street	0.0%	0.0%	0.0%	0.4%	0.8%	0.0%	0.0%	2.0%	0.0%
Somerfield - 81 High Street	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Others - Chichester	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%
Total Chichester	26.1%	11.2%	22.0%	11.4%	3.9%	4.8%	14.9%	46.1%	50.0%
Iceland - Goring Road	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose - High Street	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco - New Road	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op - Goring	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's - Lyon Farm Retail Park	0.0%	0.0%	0.0%	0.7%	0.8%	0.0%	0.0%	0.0%	0.0%
Other, Worthing	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%
Total Worthing	0.0%	0.0%	0.0%	7.1%	0.8%	1.6%	0.0%	0.0%	0.0%
Other, Shoreham by Sea	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	1.5%	0.0%	0.0%
Other, Arundel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
Other, Havant	1.1%	0.0%	0.8%	0.4%	0.0%	1.6%	0.0%	0.0%	0.0%
Other, Brighton	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Locations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Outside Area	27.2%	12.2%	23.7%	22.4%	33.9%	44.4%	33.5%	54.9%	53.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source/notes

1. Survey conducted in October 2007 by Research and Marketing Plus.

Table 4b - Convenience market shares by Zone at 2007 - top up shopping

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Inside Catchment Area									
Morrison's - 30 Bedford Street	11.3%	26.2%	17.6%	23.3%	7.0%	13.6%	4.3%	0.0%	3.8%
Iceland - 111 Queensway	0.0%	1.6%	0.0%	5.0%	1.4%	0.0%	0.0%	1.5%	0.0%
Tesco Express - 15-17 Station Rd	1.9%	3.3%	5.4%	5.6%	1.4%	0.0%	0.0%	0.0%	0.0%
Total Bognor Regis Town Centre	13.2%	31.1%	23.0%	33.9%	9.9%	13.6%	4.3%	1.5%	3.8%
Lidl - Peel Centre Shripney	0.0%	4.9%	2.7%	2.2%	1.4%	0.0%	2.2%	0.0%	0.0%
Tesco - Shripney Road	7.5%	19.7%	5.4%	18.9%	9.9%	4.5%	0.0%	15.4%	3.8%
Co-Op - 68 Rose Green Road	20.8%	0.0%	14.9%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express - 194-196 Pagham Road	18.9%	0.0%	2.7%	1.1%	0.0%	0.0%	2.2%	0.0%	0.0%
Co-Op - 53 Hawthorne Road	1.9%	0.0%	2.7%	8.9%	0.0%	2.3%	0.0%	0.0%	0.0%
Tesco Express - Aldwick Road	0.0%	0.0%	1.4%	1.7%	0.0%	0.0%	0.0%	0.0%	3.8%
Others, Felpham	1.9%	1.6%	0.0%	0.0%	40.8%	2.3%	2.2%	1.5%	3.8%
Others, Yapton	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	15.2%	0.0%	7.7%
Others, Bognor Regis	20.8%	26.2%	29.7%	12.2%	14.1%	25.0%	4.3%	3.1%	0.0%
Others, Bamham	1.9%	0.0%	0.0%	0.0%	2.8%	6.8%	4.3%	49.2%	26.9%
Others, Eastergate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%
Others, Middleton	1.9%	4.9%	0.0%	1.1%	4.2%	38.6%	0.0%	0.0%	0.0%
Others, Westergate	0.0%	0.0%	0.0%	0.6%	0.0%	2.3%	0.0%	3.1%	0.0%
Total Bognor Regis Non-Town Centre	75.5%	57.4%	59.5%	47.8%	74.6%	31.8%	30.4%	30.0%	46.2%
Total Study Area	38.7%	38.5%	32.4%	31.7%	34.5%	35.5%	34.8%	31.5%	50.0%
Sainsbury's - High Street	0.0%	0.0%	1.4%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco - Broadpiece	0.0%	0.0%	0.0%	0.0%	1.4%	2.3%	15.2%	4.6%	0.0%
Somerfield - 97-117 Wick Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%
Sainsbury's - New Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Others - Littlehampton	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	6.5%	0.0%	3.8%
Total Littlehampton	0.0%	0.0%	1.4%	0.6%	7.0%	2.3%	23.9%	4.6%	3.8%
Tesco - 35 South Street	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	1.5%	0.0%
Marks and Spencers - 16 East Street	0.0%	1.6%	2.7%	1.1%	4.2%	0.0%	0.0%	0.0%	7.7%
Waitrose Via - Ravenna	1.9%	0.0%	4.1%	1.1%	1.4%	0.0%	0.0%	3.1%	3.8%
Sainsbury's - Westhampnett	1.9%	3.3%	2.7%	2.2%	0.0%	0.0%	6.5%	1.5%	7.7%
Tesco - Fishbourne Road	0.0%	1.6%	0.0%	1.1%	0.0%	0.0%	4.3%	0.0%	0.0%
Tesco - 7-8 East Street	0.0%	0.0%	0.0%	0.6%	0.0%	2.3%	0.0%	0.0%	0.0%
Somerfield - 81 High Street	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Others - Chichester	3.8%	4.9%	5.4%	0.6%	0.0%	0.0%	0.0%	7.7%	3.8%
Total Chichester	7.5%	11.5%	14.9%	7.8%	5.6%	2.3%	10.9%	13.8%	23.1%
Iceland - Goring Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose - High Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco - New Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op - Goring	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's - Lyon Farm Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, Worthing	0.0%	0.0%	0.0%	5.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Total Worthing	0.0%	0.0%	0.0%	5.7%	1.4%	0.0%	0.0%	0.0%	0.0%
Other, Shoreham by Sea	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, Arundel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.4%	0.0%	23.1%
Other, Havant	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, Brighton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Locations	3.8%	0.0%	0.0%	1.1%	1.4%	0.0%	0.0%	0.0%	0.0%
Total Outside Area	11.3%	11.5%	17.6%	18.3%	15.5%	4.5%	55.2%	18.5%	50.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source/notes:

1. Survey conducted in October 2007 by Research and Marketing Plus.

Table 4c - Convenience goods expenditure distribution by zone in 2007 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Inside Catchment Area										
Morrison's - 30 Bedford Street	£2.1	£2.3	£2.7	£8.1	£2.2	£0.9	£0.4	£0.2	£0.2	£19.1
Asda - 111 Queensway	£0.1	£0.1	£0.1	£0.9	£0.1	£0.0	£0.0	£0.2	£0.0	£1.5
Tesco Express - 15-17 Station Rd	£0.4	£0.1	£0.8	£0.7	£0.1	£0.0	£0.0	£0.1	£0.0	£2.1
Total Boonor Reids Town Centre	£2.6	£2.6	£3.6	£9.7	£2.3	£0.9	£0.4	£0.5	£0.2	£22.7
Lidl - Peel Centre Shrovey	£0.3	£0.4	£0.2	£0.4	£0.2	£0.3	£0.0	£0.0	£0.0	£1.9
Tesco - Shrovey Road	£4.1	£7.8	£6.2	£14.4	£6.2	£2.8	£0.6	£4.3	£1.5	£47.9
Co-Op - 68 Rye Green Road	£1.0	£0.0	£0.7	£0.3	£0.0	£0.0	£0.1	£0.0	£0.0	£2.0
Tesco Express - 194-196 Padham Road	£0.8	£0.0	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£1.3
Co-Op - 53 Hawthorne Road	£0.1	£0.0	£0.1	£0.9	£0.0	£0.1	£0.0	£0.0	£0.0	£1.1
Tesco Express - Aldwick Road	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3
Others - Feltham	£0.1	£0.1	£0.0	£0.0	£1.8	£0.1	£0.0	£0.1	£0.1	£2.1
Others - Yantlin	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.3	£0.0	£0.2	£0.6
Others - Boonor Reids	£0.7	£0.9	£1.4	£1.5	£0.8	£0.8	£0.2	£0.1	£0.0	£6.3
Others - Barnham	£0.1	£0.0	£0.0	£0.1	£0.1	£0.2	£0.1	£2.2	£0.6	£3.3
Others - Easterdale	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.3
Others - Mirkleton	£0.1	£0.2	£0.0	£0.1	£0.2	£0.9	£0.0	£0.0	£0.0	£1.4
Others - Westmatta	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.2
Total Boonor Reids Non-Town Centre	£7.1	£9.3	£8.7	£18.1	£9.3	£5.3	£1.5	£7.1	£2.4	£68.8
Total Shury Area	£9.7	£11.9	£12.4	£27.8	£11.7	£6.1	£1.9	£7.6	£2.5	£91.5
Sainsbury's - High Street	£0.0	£0.0	£0.1	£0.1	£0.1	£0.2	£0.3	£0.1	£0.0	£0.9
Tesco - Broadpiece	£0.0	£0.0	£0.0	£0.2	£2.6	£2.3	£4.2	£0.9	£0.1	£10.3
Somerfield - 97-117 Wick Street	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.3
Sainsbury's - New Road	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.1	£0.1	£0.0	£0.5
Others - Littlehampton	£0.0	£0.0	£0.1	£0.0	£0.2	£0.0	£0.2	£0.0	£0.1	£0.6
Total Littlehampton	£0.0	£0.1	£0.2	£0.4	£3.2	£2.6	£4.9	£1.1	£0.2	£12.6
Tesco - 35 South Street	£0.5	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.6	£0.0	£1.3
Marks and Spencer - 16 East Street	£0.1	£0.1	£0.1	£0.3	£0.2	£0.0	£0.0	£0.1	£0.2	£1.0
Waitrose Via - Ravenna	£0.2	£0.0	£0.7	£0.5	£0.5	£0.3	£0.2	£0.7	£0.3	£3.3
Sainsbury's - Westhamonett	£1.5	£1.2	£1.9	£2.2	£0.6	£0.0	£1.0	£3.2	£1.5	£13.2
Tesco - Fishbourne Road	£0.2	£0.1	£0.3	£0.2	£0.1	£0.0	£0.1	£0.0	£0.2	£1.2
Tesco - 7-8 East Street	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.2	£0.0	£0.5
Somerfield - 81 High Street	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Others - Chichester	£0.2	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£1.2
Total Chichester	£2.7	£1.5	£3.2	£3.7	£1.5	£0.4	£1.3	£5.3	£2.3	£21.9
Asda - Gorring Road	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Waitrose - High Street	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Tesco - New Road	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Co-Op - Gorring	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Sainsbury's - Lion Farm Retail Park	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
Other - Worthing	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.0	£0.0	£0.0	£0.6
Total Worthing	£0.0	£0.0	£0.0	£2.5	£0.2	£0.1	£0.0	£0.0	£0.0	£2.7
Other - Shoreham by Sea	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.1	£0.0	£0.0	£0.8
Other - Arundel	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.3	£1.2
Other - Havant	£0.1	£0.0	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.5
Other - Brighton	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Other Locations	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
Total Outside Area	£2.9	£1.6	£3.5	£7.6	£4.8	£3.2	£7.1	£6.4	£2.8	£40.0
Total	£12.6	£13.5	£15.9	£35.3	£16.5	£9.4	£9.0	£13.9	£5.3	£131.5

Source/notes:

1 Tables 3a, 4a and 4b

Table 4d - Convenience goods expenditure distribution by zone in 2011 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
Inside Catchment Area										
Armsdon's - 30 Redford Street	12.2	12.5	12.8	18.6	12.3	10.9	10.4	10.2	10.2	120.2
Arundel - 111 Queensway	10.1	10.2	10.1	11.0	10.1	10.0	10.0	10.2	10.0	11.6
Tesco Express - 15-17 Station Rd	10.4	10.1	10.9	10.7	10.1	10.0	10.0	10.1	10.0	12.2
Total Bonnor Revis Town Centre	12.8	12.7	13.8	110.3	12.4	10.9	10.4	10.5	10.2	124.1
Arundel - Peel Centre/Shriney	10.3	10.5	10.2	10.4	10.2	10.4	10.1	10.0	10.0	12.0
Tesco - Shriney Road	14.3	18.3	16.4	115.3	16.5	12.9	10.7	14.7	11.6	150.6
Co-Op - 68 Rosa Green Road	11.0	10.0	10.7	10.3	10.0	10.0	10.1	10.0	10.0	12.1
Tesco Express - 194-196 Panham Road	10.8	10.0	10.1	10.2	10.0	10.1	10.1	10.0	10.0	11.3
Co-Op - 53 Hawthorne Road	10.1	10.0	10.1	10.9	10.0	10.1	10.0	10.0	10.0	11.2
Tesco Express - Aldwick Road	10.0	10.0	10.1	10.3	10.0	10.0	10.0	10.0	10.1	10.4
Others, Feltham	10.1	10.1	10.0	10.0	11.9	10.1	10.1	10.1	10.1	12.2
Others, Yarnon	10.0	10.0	10.0	10.0	10.1	10.0	10.4	10.0	10.2	10.7
Others, Bonnor Revis	10.7	10.9	11.4	11.6	10.8	10.8	10.2	10.1	10.0	16.6
Others, Ramham	10.1	10.0	10.0	10.1	10.1	10.2	10.1	12.4	10.6	13.6
Others, Eastmole	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.3	10.0	10.3
Others, Middleton	10.1	10.2	10.0	10.1	10.2	11.0	10.0	10.0	10.0	11.5
Others, Westmole	10.0	10.0	10.0	10.1	10.0	10.1	10.0	10.1	10.0	10.2
Total Bonnor Revis Non-Town Centre	17.3	19.9	19.1	119.3	19.7	15.5	11.6	17.6	12.5	172.6
Total Study Area	110.1	112.7	112.9	129.6	112.2	16.5	12.0	18.1	12.7	196.7
Outside Catchment Area										
Sainsbury's - High Street	10.0	10.0	10.1	10.2	10.1	10.2	10.3	10.1	10.0	11.0
Tesco - Arundel	10.0	10.0	10.0	10.2	12.7	12.4	14.5	10.9	10.1	110.9
Somerfield - 97-117 Wick Street	10.0	10.1	10.0	10.0	10.0	10.1	10.1	10.0	10.0	10.3
Sainsbury's - New Road	10.0	10.0	10.0	10.1	10.2	10.0	10.1	10.1	10.0	10.5
Others - Littlehampton	10.0	10.0	10.1	10.0	10.2	10.0	10.3	10.0	10.1	10.7
Total Littlehampton	10.0	10.1	10.2	10.5	13.3	12.8	15.2	11.2	10.2	113.3
Tesco - 35 South Street	10.5	10.0	10.0	10.3	10.0	10.0	10.0	10.6	10.0	11.4
Wicks and Snennors - 16 East Street	10.1	10.1	10.1	10.3	10.2	10.0	10.0	10.1	10.2	11.1
Waltham Via - Ravenna	10.2	10.0	10.7	10.5	10.5	10.4	10.2	10.8	10.3	13.5
Sainsbury's - Westhammeit	11.5	11.3	12.0	12.3	10.6	10.0	11.0	13.5	11.6	114.0
Tesco - Fishbourne Road	10.2	10.1	10.3	10.2	10.1	10.0	10.1	10.0	10.3	11.3
Tesco - 7-8 East Street	10.0	10.0	10.0	10.2	10.1	10.1	10.0	10.2	10.0	10.5
Somerfield - 81 High Street	10.0	10.0	10.0	10.2	10.0	10.0	10.0	10.0	10.0	10.2
Others - Chichester	10.2	10.2	10.2	10.1	10.0	10.0	10.0	10.5	10.1	11.2
Total Chichester	12.8	11.6	13.3	13.9	11.5	10.4	11.3	15.7	12.5	123.1
Arundel - Gorinn Road	10.0	10.0	10.0	10.1	10.0	10.0	10.0	10.0	10.0	10.1
Waltham - High Street	10.0	10.0	10.0	10.3	10.0	10.0	10.0	10.0	10.0	10.3
Tesco - New Road	10.0	10.0	10.0	10.8	10.0	10.0	10.0	10.0	10.0	10.8
Co-Op - Gorinn	10.0	10.0	10.0	10.8	10.0	10.0	10.0	10.0	10.0	10.8
Sainsbury's - Lion Farm Retail Park	10.0	10.0	10.0	10.2	10.1	10.0	10.0	10.0	10.0	10.3
Other Worthing	10.0	10.0	10.0	10.5	10.1	10.1	10.0	10.0	10.0	10.6
Total Worthing	10.0	10.0	10.0	12.6	10.2	10.1	10.0	10.0	10.0	12.9
Other, Shoreham by Sea	10.0	10.0	10.0	10.7	10.0	10.0	10.1	10.0	10.0	10.8
Other, Arundel	10.0	10.0	10.0	10.0	10.0	10.0	11.0	10.0	10.3	11.3
Other, Havant	10.1	10.0	10.2	10.1	10.0	10.1	10.0	10.0	10.0	10.5
Other, Brighton	10.0	10.0	10.0	10.1	10.0	10.0	10.0	10.0	10.0	10.1
Other Locations	10.1	10.0	10.0	10.1	10.1	10.0	10.0	10.0	10.0	10.3
Total Outside Area	13.0	11.7	13.7	18.1	15.0	13.4	17.6	16.9	13.0	142.4
Total	113.1	114.4	116.5	137.6	117.2	19.8	19.7	15.0	15.7	1139.1

Source/notes:

1. Tables 3a, 4a and 4b.

Table 6 - Benchmark turnover of convenience goods outlets

Stores/Location	Total Floorspace		Convenience Floorspace		Average convenience goods sales density £/sq m		Benchmark convenience turnover
	Gross	Net	%	sq m	sq m net	£/sq m	£m
Inside Catchment Area							
Morrison's - 30 Bedford Street	-	2,062	77.7%	1,602	1,602	211.025	217.66
celand - 111 Queensway	-	330	33.4%	388	388	25.645	23.32
Tesco Express - 15-17 Station Rd	-	34	30.0%	38	38	212.774	20.74
Others	-	1,594	30.0%	1,435	1,435	25.748	28.25
Total Boonor Reids Town Centre	-	2,756	-	2,248	-	-	230.0
ldi - Peel Centre Shrinnev	-	738	77.7%	572	572	23.585	22.05
Tesco - Shrinnev Road	-	1,679	33.1%	2,952	2,952	212.774	237.71
Co-Op - 68 Rose Green Road	-	157	31.6%	128	128	25.748	20.74
Tesco Express - 194-196 Potham Road	-	139	30.0%	125	125	212.774	21.60
Co-Op - 53 Hawthorne Road	-	108	31.6%	38	38	25.748	20.51
Tesco Express - Aldwick Road	-	120	31.6%	38	38	212.774	21.25
Others, Feloham	-	-	-	382	382	25.748	22.20
Others, Yaxton	-	229	33.1%	144	144	25.748	20.83
Others, Boonor Reids	-	-	-	200	200	25.748	21.15
Others, Ramham	-	-	-	200	200	25.748	21.15
Others, Eastemate	-	-	-	200	200	25.748	21.15
Others, Middleton	-	-	-	201	201	25.748	21.16
Others, Westeroale	-	-	-	200	200	25.748	21.15
Total Boonor Reids Non-Town Centre	-	3,168	-	3,491	3,491	-	252.6
Total Study Area	-	12,336	-	10,983	-	-	282.6
Outside Catchment Area							
Sainsbury's - High Street	-	-	-	-	-	-	-
Tesco - Arundel	-	-	-	-	-	-	-
Somerfield - 97-117 Wick Street	-	-	-	-	-	-	-
Sainsbury's - New Road	-	-	-	-	-	-	-
Others - Littlehampton	-	-	-	-	-	-	-
Total Littlehampton	-	-	-	-	-	-	-
Tesco - 35 South Street	-	-	-	-	-	-	-
arks and Soencers - 16 East Street	-	-	-	-	-	-	-
Naitrose Via - Ravenna	-	-	-	-	-	-	-
Sainsbury's - Westhamneft	-	-	-	-	-	-	-
Tesco - Fishbourne Road	-	-	-	-	-	-	-
Tesco - 7-8 East Street	-	-	-	-	-	-	-
Somerfield - 81 High Street	-	-	-	-	-	-	-
Others - Chichester	-	-	-	-	-	-	-
Total Chichester	-	-	-	-	-	-	-
celand - Gorina Road	-	-	-	-	-	-	-
Naitrose - High Street	-	-	-	-	-	-	-
Tesco - New Road	-	-	-	-	-	-	-
Co-Op - Gorina	-	-	-	-	-	-	-
Sainsbury's - Lyon Farm Retail Park	-	-	-	-	-	-	-
Other, Worthing	-	-	-	-	-	-	-
Total Worthing	-	-	-	-	-	-	-
Other, Shoreham by Sea	-	-	-	-	-	-	-
Other, Arundel	-	-	-	-	-	-	-
Other, Havant	-	-	-	-	-	-	-
Other, Brighton	-	-	-	-	-	-	-
Other Locations	-	-	-	-	-	-	-
Total Outside Area	-	-	-	-	-	-	-

Source/notes:-

1. Floorspace taken from IGD - GOAD and Coastal Towns Retail Study (2005)

2. Benchmark turnover data from Retail Rankings and Verdict 2007.

Table 7 - Comparison turnover of main centres and stores (£m)

	2007	2011
Bognor town centre	£73.49	£80.17
District and local centres	£35.59	£38.83
Chichester town centre	£199.23	£217.35
Non town centre in Arun	£49.62	£54.13
Tesco, Shripney Road	£15.79	£17.22

Source/notes:

1. Turnover of Bognor Regis estimated to be £79.1m in 2005 in 2001 prices.
2. Turnover has been increased by 2.2% per annum between 2005 and 2007 (source: Experian).
3. Turnover estimate in 2001 prices has been converted to 2006 prices using a factor of 0.88 (source: Experian).
4. Turnover of comparison floorspace of Tesco at Shripney Road estimated by Drivers Jonas using company average data.
5. District and local centres definition provided by DTZ in Coastal Districts Retail Study (2005).

Table 8 - Commitments (2011)

	sq m net	Turnover £/ sq m	Total Turnover (£m)
(a) Convenience			
Site 6, Felpham	76	£5,579	£0.42
(b) Comparison			
Hothampton Site, Bognor Regis	2,258	£5,642	£12.74
Regis Site, Bognor Regis	1,838	£5,642	£10.37
Site 6, Felpham	76	£5,642	£0.43
		Total	£23.96

Source/notes:

1. Information on retail floorspace at Site 6 taken from planning application.
2. Information on Hothampton and Regis Centre sites provided by Arun District Council.

Table 9 (a) Convenience goods capacity assessment (£m)

	2007	2011
Available expenditure	£131.5	£139.0
Potential turnover of existing shops in Study Area	£82.6	£84.6
Surplus capacity	£48.9	£54.4
Expenditure leakage	£40.0	£42.4
Over-trading	£8.9	£12.0

Table 9 (b) Core comparison goods capacity assessment (£m)

	2007	2011
Available expenditure	£137.9	£168.6
Potential turnover of existing shops in Bognor Regis town centre	£73.5	£80.2
Potential turnover of district centres and local shops in Bognor Regis	£35.6	£38.8
Surplus capacity	£28.8	£49.6
Turnover of commitments	-	£24.0
Adjusted surplus	-	£25.6

Source/notes:

1. Tables 3a, 3b, 4c, 4d, 6 and 7.

Table 10 - Breakdown of goods based turnover of Asda at design year

Total floorspace	7,500
Net floorspace	4,459

Convenience

Sales area	2,973
Sales density	£12,816
Sub-total	£38.1

Comparison

Sales area	1,486
Sales density	£7,736
Sub-total	£11.5

Total	£49.6
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	Total	Convenience	Comparison
% from outside Study Area	10%	10%	10%
% from inside Study Area	90%	90%	90%
£m from inside Study Area	£44.6	£34.3	£10.3
£m from outside Study Area	£5.0	£3.8	£1.1

Source/notes:

1. Split between convenience and comparison sales provided by Asda.
2. Asda sales density based on Retail Rankings and Verdict, 2007.
3. Trade draw has been estimated by Drivers Jonas.

Table 11 - Convenience goods distribution by zone at 2011 with Asda store

Morrison's - 30 Bedford Street	£1.9	£2.2	£2.5	£6.9	£2.2	£0.8	£0.4	£0.2	£0.2	£17.5
Iceland - 111 Queensway	£0.1	£0.2	£0.1	£0.9	£0.1	£0.0	£0.0	£0.2	£0.0	£1.5
Tesco Express - 15-17 Station Rd	£0.4	£0.1	£0.9	£0.7	£0.1	£0.0	£0.0	£0.1	£0.0	£2.2
Total Bognor Regis Town Centre	£2.4	£2.5	£3.5	£8.5	£2.3	£0.8	£0.4	£0.5	£0.2	£21.2
<i>Asda, Oldlands Farm</i>	£2.8	£5.8	£4.0	£9.9	£4.2	£1.9	£1.4	£3.5	£0.9	£34.3
Lidl - Peel Centre Shripney	£0.3	£0.5	£0.2	£0.4	£0.2	£0.4	£0.1	£0.0	£0.0	£2.0
Tesco - Shripney Road	£2.3	£3.3	£3.5	£8.4	£3.6	£1.8	£0.4	£2.6	£0.9	£26.7
Co-Op - 68 Rose Green Road	£1.0	£0.0	£0.7	£0.3	£0.0	£0.0	£0.1	£0.0	£0.0	£2.1
Tesco Express - 194-196 Pagham Road	£0.8	£0.0	£0.1	£0.2	£0.0	£0.1	£0.1	£0.0	£0.0	£1.3
Co-Op - 53 Hawthorne Road	£0.1	£0.0	£0.1	£0.9	£0.0	£0.1	£0.0	£0.0	£0.0	£1.2
Tesco Express - Aldwick Road	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4
Others, Felpham	£0.1	£0.1	£0.0	£0.0	£1.9	£0.1	£0.1	£0.1	£0.1	£2.2
Others, Yapton	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£0.2	£0.7
Others, Bognor Regis	£0.7	£0.9	£1.4	£1.6	£0.8	£0.8	£0.2	£0.1	£0.0	£6.6
Others, Barnham	£0.1	£0.0	£0.0	£0.1	£0.1	£0.2	£0.1	£2.4	£0.6	£3.6
Others, Eastergate	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.3
Others, Middleton	£0.1	£0.2	£0.0	£0.1	£0.2	£1.0	£0.0	£0.0	£0.0	£1.5
Others, Westergate	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.0	£0.2
Total Bognor Regis Non-Town Centre	£8.2	£10.8	£10.2	£22.2	£10.9	£6.2	£2.7	£9.0	£2.7	£83.1
Total Study Area	£10.6	£13.3	£13.7	£30.7	£13.3	£7.0	£3.2	£9.5	£2.9	£104.3
Sainsbury's - High Street	£0.0	£0.0	£0.1	£0.2	£0.1	£0.2	£0.3	£0.1	£0.0	£1.0
Tesco - Broadpiece	£0.0	£0.0	£0.0	£0.2	£1.8	£1.9	£3.8	£0.8	£0.1	£8.6
Somerfield - 97-117 Wick Street	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.3
Sainsbury's - New Road	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.1	£0.1	£0.0	£0.5
Others - Littlehampton	£0.0	£0.0	£0.1	£0.0	£0.2	£0.0	£0.3	£0.0	£0.1	£0.7
Total Littlehampton	£0.0	£0.1	£0.2	£0.5	£2.3	£2.3	£4.6	£1.0	£0.2	£11.0
Tesco - 35 South Street	£0.5	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.6	£0.0	£1.4
Marks and Spencers - 16 East Street	£0.1	£0.1	£0.1	£0.3	£0.2	£0.0	£0.0	£0.1	£0.2	£1.1
Waitrose Via - Ravenna	£0.2	£0.0	£0.7	£0.5	£0.5	£0.4	£0.2	£0.8	£0.3	£3.5
Sainsbury's - Westhampnett	£1.0	£0.7	£1.3	£1.3	£0.5	£0.0	£0.7	£2.3	£1.5	£9.2
Tesco - Fishbourne Road	£0.2	£0.1	£0.3	£0.2	£0.1	£0.0	£0.1	£0.0	£0.2	£1.2
Tesco - 7-8 East Street	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.0	£0.2	£0.0	£0.5
Somerfield - 81 High Street	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Others - Chichester	£0.2	£0.2	£0.2	£0.1	£0.0	£0.0	£0.0	£0.5	£0.1	£1.2
Total Chichester	£2.2	£1.0	£2.6	£2.9	£1.4	£0.4	£1.0	£4.5	£2.3	£18.3
Iceland - Goring Road	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Waitrose - High Street	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Tesco - New Road	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Co-Op - Goring	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Sainsbury's - Lyon Farm Retail Park	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
Other, Worthing	£0.0	£0.0	£0.0	£0.5	£0.1	£0.1	£0.0	£0.0	£0.0	£0.6
Total Worthing	£0.0	£0.0	£0.0	£2.6	£0.2	£0.1	£0.0	£0.0	£0.0	£2.9
Other, Shoreham by Sea	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.1	£0.0	£0.0	£0.8
Other, Arundel	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.3	£1.2
Other, Havant	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other, Brighton	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Other Locations	£0.1	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
Total Outside Area	£2.4	£1.1	£2.8	£6.9	£3.9	£2.8	£6.5	£5.5	£2.8	£34.7
Total	£13.0	£14.4	£16.5	£37.6	£17.2	£9.8	£9.7	£15.0	£5.7	£139.0

Source/notes:

1. Table 4d and 10.

Table 12 - Convenience goods based impact summary table

	Turnover at base year - 2007 (£m)	Turnover at design year - 2011 (£m)	Trade diverted at design year £m	Impact (%)
Morrisons - 30 Barfot Street	19.1	20.2	2.7	13.3%
celand - 111 Queensway	1.5	1.6	0.1	3.2%
Tesco Express - 15-17 Station Rd	2.1	2.2	0.0	0.0%
Other town centre	8.2	8.3	0.0	0.0%
Total Boonor Reids Town Centre	31.0	32.3	2.8	1.6%
Asda, Oldlands Farm	-	-	-	-
Jd - Peel Centre Shrove	1.9	2.0	0.0	0.0%
Tesco - Shrove Road	47.9	50.6	23.9	17.2%
Co-Op - 68 Rose Green Road	2.0	2.1	0.0	0.0%
Tesco Express - 194-196 Padham Road	1.3	1.3	0.0	0.0%
Co-Op - 53 Hawthorne Road	1.1	1.2	0.0	0.0%
Tesco Express - Aldwick Road	0.3	0.4	0.0	0.0%
Others, Feltham	2.1	2.2	0.0	0.0%
Others, Yarnon	0.6	0.7	0.0	0.0%
Others, Boonor Reids	6.3	6.6	0.0	0.0%
Others, Barnham	3.3	3.6	0.0	0.0%
Others, Eastgate	0.3	0.3	0.0	0.0%
Others, Middleham	1.4	1.5	0.0	0.0%
Others, Westgate	0.2	0.2	0.0	0.0%
Total Boonor Reids Non-Town Centre	68.8	72.6	23.9	12.9%
Total Study Area				
Sainsbury's - High Street	0.9	1.0	0.0	0.0%
Tesco - Broadpiece	10.3	10.9	2.3	11.1%
Somerfield - 97-117 Wick Street	0.3	0.3	0.0	0.0%
Sainsbury's - New Road	0.5	0.5	0.0	0.0%
Others - Littlehampton	0.6	0.7	0.0	0.0%
Total Littlehampton	12.6	13.3	2.3	17.2%
Tesco - 35 South Street	1.3	1.4	0.0	0.0%
Marks and Spencers - 16 East Street	1.0	1.1	0.0	0.0%
Waitrose Via - Ravenna	3.3	3.5	0.0	0.0%
Sainsbury's - Westhamonett	13.2	14.0	4.8	14.3%
Tesco - Fishbourne Road	1.2	1.3	0.0	0.0%
Tesco - 7-8 East Street	0.5	0.5	0.0	0.0%
Somerfield - R1 High Street	0.1	0.2	0.0	0.0%
Others - Chichester	1.2	1.2	0.0	0.0%
Total Chichester	21.9	23.1	4.8	20.8%
celand - Gorring Road	0.1	0.1	0.0	0.0%
Waitrose - High Street	0.3	0.3	0.0	0.0%
Tesco - New Road	0.8	0.8	0.0	0.0%
Co-Op - Gorring	0.7	0.8	0.0	0.0%
Sainsbury's - Lion Farm Retail Park	0.3	0.3	0.0	0.0%
Other, Worthing	0.6	0.6	0.0	0.0%
Total Worthing	2.7	2.9	0.0	0.0%
Other, Shoreham by Sea	0.8	0.8	0.0	0.0%
Other, Anundel	1.2	1.3	0.1	7.4%
Other, Havant	0.5	0.5	0.5	100.0%
Other, Brighton	0.1	0.1	0.0	0.0%
Other Locations	0.3	0.3	0.0	0.0%
Total Outside Area	2.8	3.0	0.6	19.5%

Source/notes:-

1. Tables 10 and 11.

Table 13 - Comparison goods impact table

	2011	Trade diversion to Asda (£m)	Impact (%)
Bognor town centre	£104.1	£1.6	1.49%
District and local centres	£38.8	£0.5	1.33%
Chichester town centre	£217.3	£2.7	1.24%
Non town centre in Arun	£54.1	£1.6	2.87%
Tesco, Shripney Road	£17.2	£3.6	21.03%
Asda, Havant		£0.5	
		£10.4	

Source/notes:

1. Table 7 and 10.

Table 14 - Total estimates of trade diversion

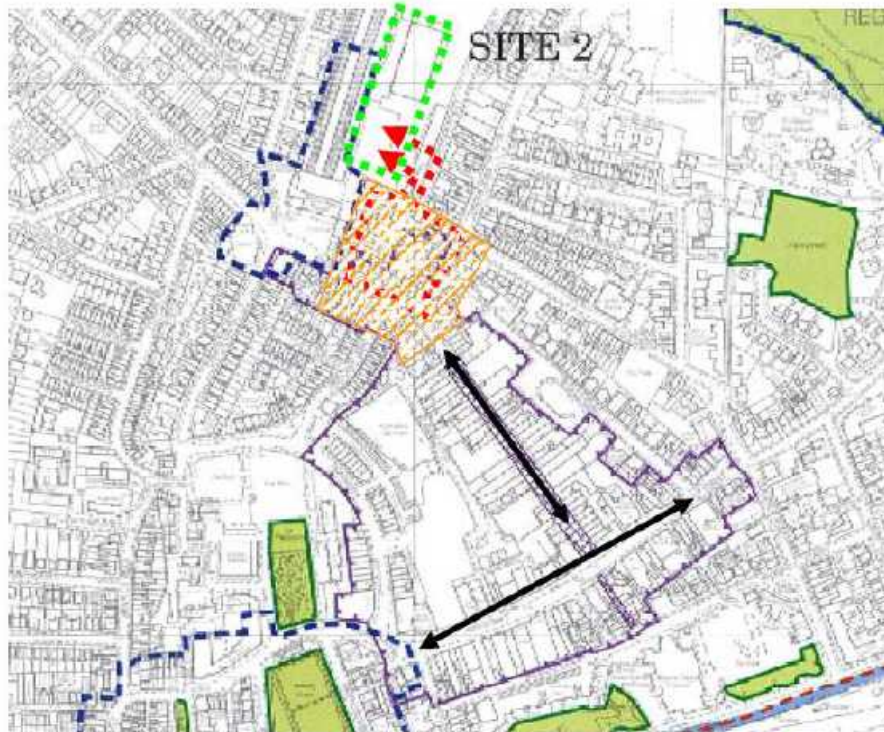
	Total turnover (£m)	Trade diversion (£m)	Trade diversion (%)
Bognor Regis town centre:			
Convenience	32.25	2.78	8.61%
Comparison	104.13	1.55	1.49%
Sub total	135.12	4.33	3.20%

Source/notes:

1. Tables 12 and 13.

Appendix B

Town Centre Sight Lines



	Covers Builders Merchants adjoining Bognor Regis railway station
	Current shopper movement and sight lines
	Existing built up area
	Route to suggested site