



Retail Response

Land West of Courtwick Lane, Wick, Littlehampton Planning Application Reference LU/72/25/OUT

1 Scope & Purpose

- 1.1 This Retail Response has been prepared following the review by Nexus Planning ('Nexus')¹ who have been instructed by Arun District Council ('ADC') to advise on retail policy matters. This follows the submission of the Retail Impact Assessment ('RIA') (March 2025) provided as part of the original planning application submission, and the subsequent Supplementary Retail Impact Assessment ('SRIA') (July 2025), prepared in response to Nexus' initial comments².

2 Overview of Nexus' Advice

- 2.1 From reviewing the latest advice from Nexus, it is understood that the following represents the position in respect of addressing relevant retail policy.
- In applying the sequential approach to site selection, Nexus agrees (at para, 6.1) that the sites assessed as part of the submitted RIA and subsequent SRIA are not available and suitable for the proposed development. Therefore, Nexus confirms that it is just North Littlehampton that requires further consideration in addressing the sequential test.
 - Nexus agrees that the proposals will not lead to a significant adverse impact (the policy test) on Rustington and Wick local centres. Nexus deems the level of impact to be 'low' and the very limited impact on these centres does not warrant a potential reason to refuse permission (as confirmed by Nexus at para. 8.10).
 - Whilst concern has been raised regarding the potential impact of the proposals on Littlehampton town centre, Nexus' advice (at para. 6.34) refers to it not being 'likely' to lead to a significant adverse impact. Paragraph 95 of the NPPF is clear in stating that the application should only be refused where it is "*likely to have a significant adverse impact*". Nexus' conclusion is that even based on their own re-assessment it is not likely the impact of the proposals on Littlehampton town centre will be significant adverse. Therefore, notwithstanding our view that Nexus has overstated the potential impact of the proposals on Littlehampton town centre for the reasons outlined below, the proposals are acceptable when considering the likely impact on Littlehampton town centre.
 - The primary difference between the two approaches (when assessing the impact on Littlehampton) relates to the anticipated level of trade diversion from the existing Lidl on New Road. Nexus estimates that the proposals will derive substantially more from this store that we have assumed. We do not accept this position. Nevertheless, it is evident

¹ 'Retail & Leisure Development Proposals: New Courtwick Lane & Norway Lane, Littlehampton – Assessment of Retail, Leisure & Town Centre Planning Policy (September 2025)'

² Briefing Note ('Initial Review of Retail & Main Town Centre Land Use Supporting Information – Requests for Clarification and Additional Information') received from ADC on the 17th July 2025



Note continued

that there has been no objection from Lidl (or any retailer) regarding to the potential impact of the proposals, and the overall impact on the town centre (which should be the basis for assessing retail impact – as established by numerous Secretary of State decisions) is unlikely to be ‘significant adverse’ given the wider role and function of Littlehampton town centre. Residents will continue to use Littlehampton town centre for wider uses should shoppers choose to visit the proposed development rather than the town centre. There is no clear evidence that the proposals are likely to lead to a significant adverse impact – which also appears to be the conclusion reached by Nexus (at para. 6.34).

- Nexus acknowledges (at para. 6.42) that the proposals will not lead to an identifiable adverse impact upon planned / committed investment, and any impact on future town centre investment will be ‘minimal’.

2.2 From reviewing the overall response provided by Nexus, **we believe that the retail impact test has been satisfied**. It is therefore only the sequential approach to site selection that remains outstanding; separate responses on this matter, and specifically assessing the suitability of North Littlehampton, have already been provided³. This is expanded upon below. In addition, notwithstanding our view that the impact test has been satisfied, a response to Nexus’s further comments on the retail impact assessment is also provided.

3 Sequential Approach

- 3.1** In addressing the sequential approach to site selection, Nexus (at para. 4.7) agrees with broad area of search.
- 3.2** Within this area, and in reviewing the sites that have been assessed, Nexus also accepts these sites, including the former Waitrose in Littlehampton town centre, do not provide a suitable or available alternative for the application proposals. The only alternative site put forward by Nexus is the proposed North Littlehampton local centre and has requested that further consideration of this site is required.
- 3.3** In considering the suitability and availability of the North Littlehampton site, planning permission was granted on 23rd January 2013 (ref. LU/47/11) for a mixed-use development, which comprised the following:
- Up to 1,260 residential dwellings (out of a potential 1,460 in the masterplan).
 - Up to 13,000 square metres of employment floorspace (Class B1) (including an Enterprise Centre of 3,000 square metres).
 - Up to 3,500 square metres of Class A local facilities.
 - A 100-bed hotel and 60-bed care home.
 - A 2-form entry primary school, community centre, and youth / leisure facilities.

³ Email correspondence to the Case Officer from ECE Planning dated 10th October 2025 and 14th October 2025



Note continued

- A combined heat and power plant, extension to the recycling centre, and green infrastructure (including sports pitches, open space, play areas and allotments).
 - Primary access from a new A259 junction (bridging over the railway), with additional access from Mill Lane and Toddington Lane.
- 3.4 In determining the proposals, and specifically the retail uses, the Officer's Report identified that the 3,500 square metres of Class A floorspace, including a convenience foodstore limited to 500 square metres. A convenience foodstore of 500 square metres was also referred to in the Planning Statement submitted in support of the outline application.
- 3.5 Reflecting the limited scale of development, a Parameters Plan was approved as part of the January 2013 permission (drawing reference GR.L-006 Rev A) that identifies retail uses beneath residential flats within an area of 0.73 hectares. A copy of the approved Parameters Plan is provided at **Document 1**.
- 3.6 Furthermore, Condition 6 of the outline consent also stipulates that:
- "The development hereby permitted **shall not** be carried out except in substantial accordance with the illustrative masterplan drawing number **GR.L-002 Rev A ('the Masterplan')**, and the Design and Access Statement incorporating Design Guidance dated February 2011."* (our emphasis)
- 3.7 Any subsequent reserved matters must comply with these parameters. The approved plans, and Design and Access Statement identify three separate buildings with retail at ground floor and residential above in the Civic Square parcel of the site.
- 3.8 A departure from such approved plans and layouts would not be reasonable or appropriate in our view and a single retail foodstore of c. 1,700 square metres would clearly not be 'in substantial accordance with these approved plans. We are therefore of the view that the outline consent provides significant controls in place to restrict the typologies and size of retail provision in the Civic Square area. A retail convenience store of the size proposed in our application would be entirely inappropriate for consideration in a future reserved matters application.
- 3.9 Nevertheless, at just 0.73 hectares the site identified for retail purposes in the approved Parameter Plan is too small to accommodate the proposed development. Indeed, just the Aldi foodstore requires a minimum site area of 0.8 hectares – as confirmed by the operator's published property requirements⁴.
- 3.10 Furthermore, as set out in the submitted RIA⁵, substantial precedent has established that there is no requirement to disaggregate the proposed development. Therefore, alternative sites must be capable of accommodate the proposed development (i.e. the foodstore and 2no. drive thru units) and not constituent elements. Such an approach is entirely consistent with that undertaken by ADC in previously determining a similar proposal at Bognor Regis⁶.

⁴ <https://www.aldi.co.uk/corporate/property/required-towns>

⁵ As set out at paragraphs 3.3 to 3.17

⁶ Ref. BE/135/18/PL



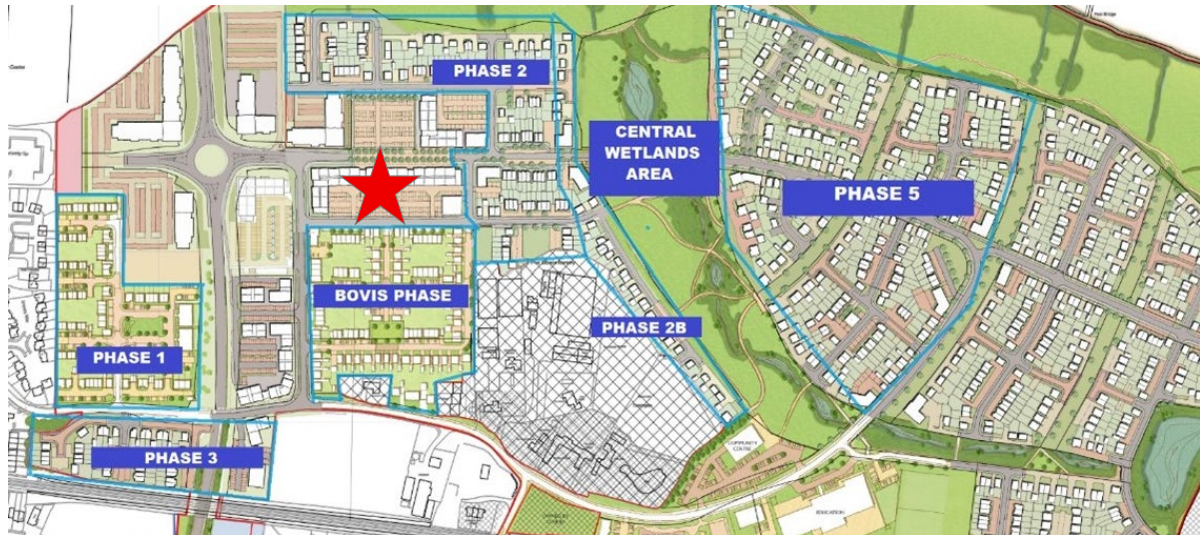
Note continued

- 3.11 Within this context, North Littlehampton site is not suitable to accommodate the proposed development.
- 3.12 Nexus also suggests (at para. 6.5) that the proposed drive through elements do not appear to be required or are a necessary part of the proposed F&B units and could be removed when considering alternative sites, such as the planned local centre at North Littlehampton. We strongly dispute this position. The drive thru elements represent a fundamental operator requirement for the prospective occupiers, which have been confirmed – Costa and McDonalds. Indeed, the description of development for the pending application is as follows:
- “Hybrid Planning Application comprising of the following: 1) - Outline application with all matters reserved (except access) for Phase 2 (West of Site) comprising development of approximately 8,800sqm GIA Light Industrial/Storage and Distribution (Use Class E(g)(iii) / B8), and 2) - Full Application for Phase 1 (East of the Site) for a food store (Use Class E(a)), 2 No. Drive-Thru food/beverage units (Sui Generis) with revised vehicular access, associated parking and landscaping.”* (our emphasis)
- 3.13 It is unreasonable to remove the drive thru elements of the proposal. The *Dundee* Supreme Court Judgment (referred to in the RIA) was clear in stating that the approach to addressing the sequential approach should be to not fundamentally compromise the development proposal. Instead, this Judgment confirmed that if a site is not suitable for the commercial requirements of the development in question, then it is not suitable for the purposes of the sequential approach. In this respect, the proposals include 2no. drive-thru units.
- 3.14 Against this background, there is no requirement to remove the drive thru elements and alternative sites must be capable of accommodate the scheme as a whole. In this respect, North Littlehampton is not suitable.
- 3.15 In addition, in considering the availability of the potential local centre at North Littlehampton, Condition 2 of the outline permission requires applications for reserved matters for the remaining phases of development to be made within 13 years from the date of this permission (i.e. by 23rd January 2026). To date, whilst reserved matters applications have been submitted for other phases of development this has not been the case for the retail element. In this respect, there is substantial uncertainty whether the retail element of the scheme will be delivered.
- 3.16 It is also suggested that there may be scope for the land identified for the retail could increase by incorporating additional development plots. It is not sure what additional plots Nexus are suggesting. However, in considering the potential for this it is important to note the following:
- Reserved matters for the plots of land immediately adjacent to the approved retail floorspace have been granted for other phases and development has come forward / been completed. An extract of these phases is provided overleaf (taken from ADC’s website⁷ with the location of the approved retail uses shown as a red star). **Accordingly, there is limited land available and any additional retail floorspace would need to be provided in a separate location to that already approved.**

⁷ <https://www.arun.gov.uk/hampton-park>



Note continued



- Any uplift in retail floorspace or a change in location for retail uses to that set out by the parameters approved under the outline consent will need planning permission. It is only the proposed local centre (as approved under the outline permission and shown on the approved Parameters Plan) that is identified to form part of the local retail hierarchy as set out by Policy 9 of the Littlehampton Neighbourhood. Additional retail floorspace provided elsewhere beyond that approved would not form part of this local centre and will need to be subject to the relevant retail tests.

3.17 For all the reasons identified North Littlehampton does not provide a suitable and available alternative for the proposed development.

4 Impact Assessment – Response to Comments Raised by Nexus

Inflow directed to Lidl

- 4.1 Nexus questions the assumption that 40% of the turnover of the existing Lidl in Littlehampton town centre will be derived from 'inflow' (i.e. expenditure derived from beyond the Study Area). This assumption has been informed by the findings of the Arun Retail Study Update ('ARSU'), which covers a wider area than that identified by the household survey completed to support the RIA. By drawing upon the findings of the ARSU, this identifies that the existing Lidl draws around 41% of its turnover from those zones that do not correlate directly with the reduced study area applied for the RIA (including zones 1, 5, 6 and 8 of the ARSU). A similar approach has been undertaken for other stores, including the existing Sainsbury's in Littlehampton town centre and Morrisons and Tesco stores in Wick / Littlehampton also commented upon by Nexus. The approach undertaken has been informed by available survey evidence.
- 4.2 The allowance for 40% inflow is further justified by the fact that the findings of the retail evidence submitted in support of the Norway Lane application, which identifies a turnover for the Lidl store of £14.43 million, which is entirely consistent with the approach of the RIA and the SRIA.



Note continued

- 4.3 The allowance for inflow to Lidl is deemed appropriate.

Pattern of Trade to the Proposed Development

- 4.4 Nexus has queried the pattern of trade draw for the proposed development on a zonal basis but overall do confirm (at para. 6.18) that *“Quod’s forecast pattern of trade diversion is reasonable”*.
- 4.5 Nexus does however suggest that a sensitivity testing could be undertaken that increases the amount of trade draw from Zone 3 and Zone 5 of the study area, so that this is not unduly influenced by the identify of the intended occupier (Aldi).
- 4.6 Such an additional scenario testing is not required. The Planning Practice Guidance (‘PPG’) that supports the NPPF is clear in stating⁸ that when applying the impact test this should:

“assess the proposal’s turnover and trade draw (drawing on information from comparable schemes, the operator’s benchmark turnover of convenience and comparison goods, and carefully considering likely catchments and trade draw)”

- 4.7 This represents the approach that has been undertaken. In this case, intended operator has been confirmed – as demonstrated by a letter of support from the intended operator (Aldi). Given this, the assessment undertaken has considered the proposed operator’s benchmark turnover and the likely catchment of the proposals. Such an approach is typical in undertaking impact assessments. The assumptions that have been applied in addressing retail impact are entirely consistent with that advocated by the PPG.

Trade Diversion of the Proposals

- 4.8 Nexus confirms (at para. 6.20) that *“the trade diversion assessment provided by Quod is logical”*. However, Nexus does raise some addition points regarding:

- The level of trade diversion from store further afield; and
- The level of trade diversion from specific stores.

- 4.9 We deal with each matter in turn below.

- 4.10 In terms of the first point, it is significant to note that it is expected that the proposals will derive the bulk of the proposal’s turnover from stores closest to the proposed development. This includes 57% of the proposal’s turnover is identified to be derived from stores within Zone 1.

- 4.11 It is expected that only a small proportion of the store’s trade will be derived from destination further afield, and it is not clear what specific stores Nexus is referring to when referring to diversion from destinations a ‘considerable distance away’. Given the limited discount food

⁸ Paragraph: 018 Reference ID: 2b-018-20190722



Note continued

retail offer in the local area, it is reasonable to assume that those who use such comparable facilities elsewhere (such as Aldi at Saltbox Road, Bognor Regis), that some will be attracted to the proposed development. However, this will only be a small proportion of trade from any specific store.

4.12 The only notable trade diversion from any specific store is identified to be from the large-format Tesco Extra at West Durrington (8.6% of the proposal's convenience retail destination). This store is located within Zone 4 of the defined Study Area. This level of trade diversion is appropriate as it is assumed that 27.5% of the proposal's turnover will be derived from this zone, and this store is the most popular food destination for residents within Zone 4. Given this, it is reasonable to assume that a notable proportion of trade will be derived from the Tesco Extra. By way of comparison, our approach assumes that 31% of the proposal's turnover will be derived from the out-of-centre Tesco in Wick, the nearest store to the Application Site. This compares to less than 9% of the proposal's turnover being derived from the much larger Tesco Extra.

4.13 With regard to the second matter, Nexus has questioned whether the trade diversion from the existing Lidl in Littlehampton town centre is appropriate given that this is a quarter the size of the diversion from Tesco and half the size of the diversion from Morrisons. In considering this point, it is important to highlight the following:

- The existing Tesco achieves a convenience turnover that is more than four times greater than the Lidl in Littlehampton, and Morrisons turnover is almost double. This differential would be even greater if inflow to Lidl is reduced – as suggested should be by Nexus. Furthermore, within Zones 1, 2 and 4, where it is expected that the bulk (c. 90%) of the proposal's turnover will be derived, the turnover of Tesco and Morrisons are identified to be 481% and 264% respectively greater than the Lidl from these zones.
- The existing Morrisons is in very close proximity to the Application Site (just 400 metres to the east). Likewise, the Tesco is located around 800 metres from the Application Site. This compares to Lidl being located 1.65 kilometres to the south.

4.14 For these reasons the identified trade diversion from the nearby Morrisons and Tesco are entirely reasonable. Overall, the trade diversion from existing facilities is robust and justified.

Trading Performance of Existing Foodstores in Littlehampton town centre

4.15 In understanding the likely impact on Littlehampton town centre, Nexus refers (at para. 6.25) to the existing Iceland and Sainsbury's trade below forecast levels, based on the findings of the household survey.

4.16 The use of household surveys should be treated with caution when identifying the actual turnover of individual stores. For example, household surveys assume that every respondent's basket or trolley spend is the same regardless of which store they visit. It is reasonable that



Note continued

an average shop at Waitrose would not be the same as at a discount retailer such as Lidl or Aldi.

- 4.17 Instead, in utilising the findings of the household survey, it is better to be used to understand broad shopping patterns and the collective turnover of existing facilities rather than individual turnover figures. In this respect, collectively, Iceland, Lidl and Sainsbury's in Littlehampton town centre are identified to be trading at around benchmark level.

Impact of the Food and Beverage Elements of the Proposal

- 4.18 Nexus (at para. 6.9) highlights that the submitted RIA does not include any reference to likely impacts of the food and beverage ('F&B') floorspace proposed. This specific matter was addressed in the subsequent SRIA, which highlighted that – should it be deemed necessary to consider the effects these elements of the overall proposal – any impact would be negligible and not significant adverse (the policy test). Notwithstanding, for completeness and on a without prejudice basis, an assessment of the likely impact of the proposed F&B uses is appended at **Document 2**.
- 4.19 The F&B assessment draws upon the findings of the household survey completed in support of the proposals at Norway Lane, which included questions on 'eating out' / takeaway habits. A summary of the findings of this additional analysis is provided below at Table 1.

Table 1 – Trading Effects of the Proposed F&B Floorspace (2030)

Centre	Impact	Change in Turnover Post Development (2025-2030)
Rustington	-2.1%	+£0.63m
Littlehampton	-2.0%	+£0.61m
Arundel	-0.7%	+£0.13m
The Strand	0.0%	£0.00m
West Durrington	0.0%	£0.00m

Source: Table 4 at Document 2

- 4.20 The above analysis shows that any impact on the F&B offer of neighbouring centres will be limited (-2.1% or less). Such low levels of impact are not deemed significant adverse. Indeed, post development, the F&B turnover of neighbouring centres will continue to increase post development. By assessing the likely impact of both the retail and F&B floorspace proposed, the overall impact reduces from -3.6% to -2.9% by 2030 (**Table 5 at Document 2**).

Impact on Town Centre Health

- 4.21 As outlined above, Nexus is clear in concluding that the identified impacts on Wick and Rustington will not be significant adverse. In terms of Littlehampton town centre, Nexus' conclusion (at para. 6.34) is that the proposals:



Note continued

*“...will exhibit a clear adverse impact on the health of Littlehampton town centre, due to the loss of trade from the centre and due to increased competition posed by the proposed foodstore and food/beverage units. In our opinion, the scale of adverse impact is such as a significant adverse impact cannot be completely ruled out at this stage, **but is by no means certain or likely.**” (our emphasis)*

- 4.22 When considering retail impact, most new development will have some adverse impact on existing centres, but the policy test is that this impact is ‘likely’ to be ‘significant adverse’. The Nexus advice confirms that it is by no means certain that the proposals are likely to lead to a significant adverse impact. On this basis, the relevant policy test has been met – a point that has been further supported by the additional F&B impact analysis that has now been provided.
- 4.23 Furthermore, in considering whether the proposal is likely to have a significant adverse impact on Littlehampton town centre, it is important to highlight that Nexus confirms that Littlehampton town centre’s health is not a significant cause for concern (para. 6.34). Despite this, Nexus suggests that there are some vulnerabilities that may make the town centre susceptible to small levels of impact. These are identified by Nexus to be the potential under-performance of the town centre and the scale of out-of-centre floorspace in the local area competing with the town centre. In terms of the former, it is not clear what the underperformance of the centre relates to. Whilst Nexus suggests that the existing Sainsbury’s and Iceland stores are underperforming, as previously highlighted this is based on the findings of the household survey, and such evidence should be treated with caution when assessing individual store performances. Instead, it is better to review the town centre performance *as a whole*, particularly as the test of impact should be based on the entire town centre. In this respect, collectively, the main foodstores in Littlehampton town centre are identified to be trading at broadly expected levels.
- 4.24 Whilst we consider that the levels of impact identified by Nexus are overstated for the reasons outlined above, even based on their own figures Nexus do not conclude that the impact on Littlehampton is likely to be significant adverse.
- 4.25 Against this background, the impact test is satisfied in respect of the application proposals. This is further supported by the email correspondence from Officers at ADC⁹, which only highlighted that the only outstanding issue in retail policy terms related to the need to further consider North Littlehampton as part of the sequential test. This additional analysis has been provided.

5 Summary & Conclusions

- 5.1 From the reviewing Nexus’ advice, it is acknowledged that the applications proposals will have some impact on neighbouring centres; all new retail development will have some adverse impact. However, the policy test is whether any impact is likely to be significant adverse. Nexus concludes that it is not certain or likely that the impact on any defined centre is likely to

⁹ Email from Emma Sheppard dated 7th October 2025



Note continued

be significant adverse. Within this context, notwithstanding our view that Nexus has overstated the potential impact of the proposals for the reasons identified, the impact test is satisfied. Nexus confirms that it is not likely that the proposals will lead to a significant adverse impact.

- 5.2 Nexus' conclusion on retail impact differs from their conclusion when assessing the much larger retail scheme at Norway Lane (at para. 8.14), namely:

"...that the Norway Lane proposal is likely to have a significant adverse impact upon the health of both Littlehampton town centre and Rustington local centre."

- 5.3 Such a conclusion is not surprising given the substantial difference in retail floorspace proposed by the larger Norway Lane development – five times greater in size.
- 5.4 We maintain that our assessment of the likely impact of the proposal provides a robust assessment of the likely trading effects of the proposal. An impact of -3.6% on Littlehampton town centre is not deemed significant adverse. This impact reduces to -2.9% by including the F&B uses. In our strong view these limited levels of impact have been based on a robust approach to assessing the likely trading effects of the proposal – drawing upon available evidence and applying realistic trade draw assumptions based on existing shopping patterns and the proximity of competing stores. Nevertheless, whilst Nexus identifies higher levels of impact (up to -7.7% on Littlehampton town centre), which we believe is overstated for the reasons identified, critically they do not suggest that this is 'likely' to be significant adverse.
- 5.5 Overall, for all the reasons identified, the impact assessment undertaken in support of the applications is robust and provides a sound basis to understanding the likely trading effects of the proposal. It continues to be demonstrated that the proposals are unlikely to lead to a significant adverse impact – a conclusion that appears to be accepted by Nexus.
- 5.6 Against this background, the impact test has been satisfied. Therefore, subject to agreement that no sequentially preferable site exists, the proposals satisfy the relevant retail policy 'tests'.
- 5.7 In terms of the sequential approach, Nexus acknowledges that the only site that requires further consideration is the proposed local centre at North Littlehampton. All other sites identified are deemed to not be suitable and available for the proposed development. In respect of North Littlehampton, as has been demonstrated, this site does not provide a suitable and available alternative for the proposed development. It is far too small to accommodate the proposed development.
- 5.8 For all the reasons identified it continues to be demonstrated that the proposals satisfy relevant retail planning policy – namely the sequential approach to site selection and the impact test.
- 5.9 Furthermore, the proposals will deliver a number of significant benefits. These include the regeneration of a prominent site, improved consumer choice and competition to the benefit of shoppers and the creation of jobs – both through the construction and operation phases. The retail and F&B uses proposed will also facilitate the creation of hundreds of new jobs through



Note continued

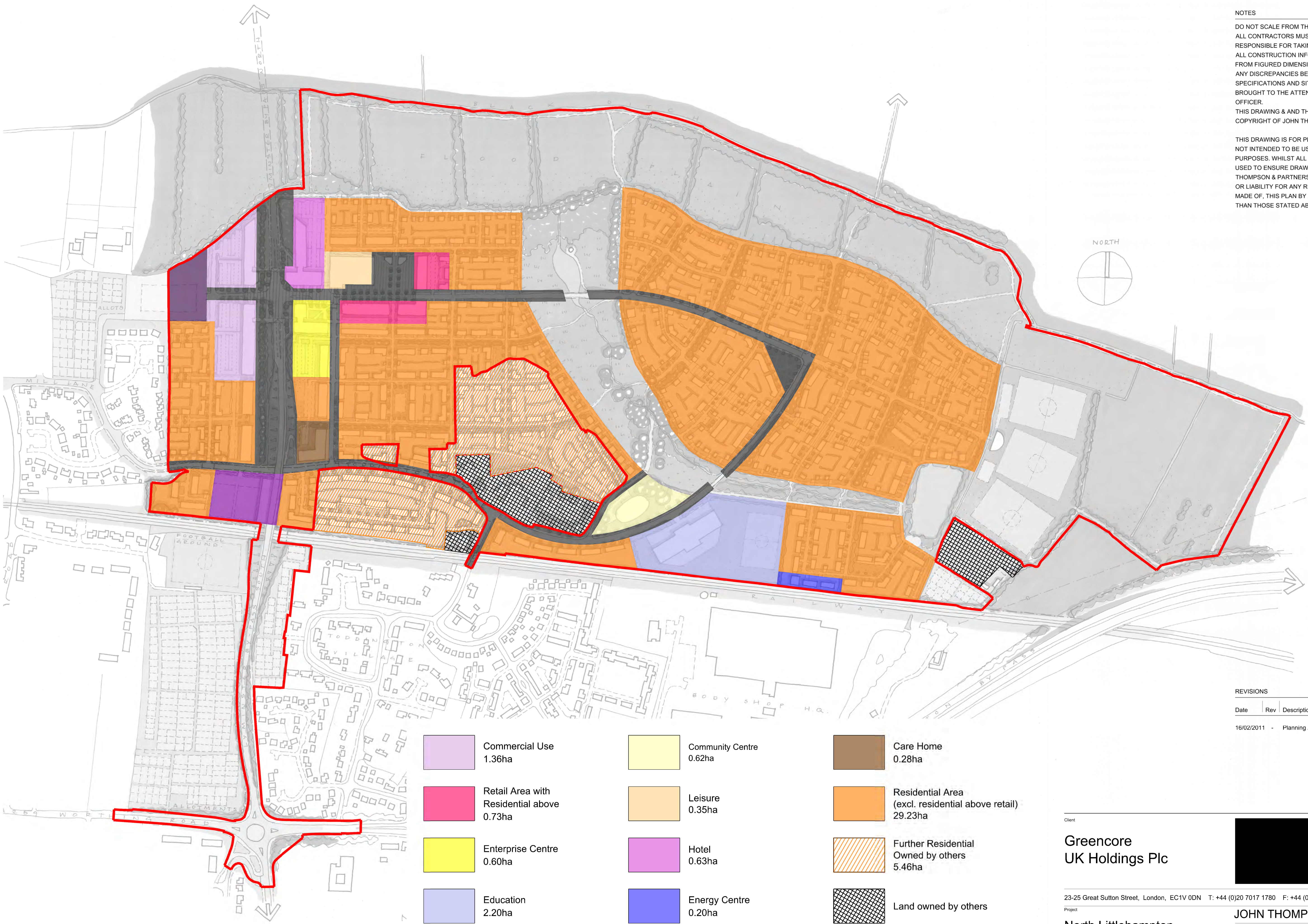
the wider commercial floorspace to be created to the west as part of the wider application being pursued. These benefits should be afforded substantial weight given the proposal's conformity with retail policy.

ENDS



Document 1

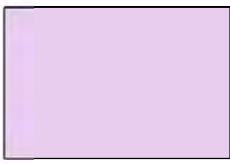
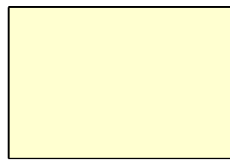
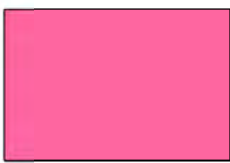
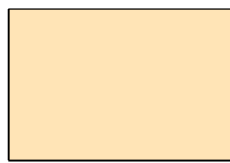
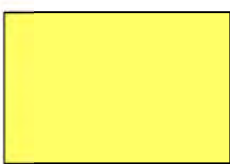
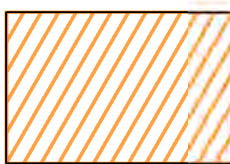
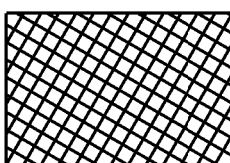
Approved Parameters Plan



NOTES

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|---|--|--|
|  Commercial Use
1.36ha |  Community Centre
0.62ha |  Care Home
0.28ha |
|  Retail Area with Residential above
0.73ha |  Leisure
0.35ha |  Residential Area (excl. residential above retail)
29.23ha |
|  Enterprise Centre
0.60ha |  Hotel
0.63ha |  Further Residential Owned by others
5.46ha |
|  Education
2.20ha |  Energy Centre
0.20ha |  Land owned by others |
|  Youth Facility
0.74ha |  Recycling Area Extention
0.51ha |  Road |

REVISIONS		
Date	Rev	Description
16/02/2011	-	Planning Application Submission

Client

Greencore UK Holdings Plc

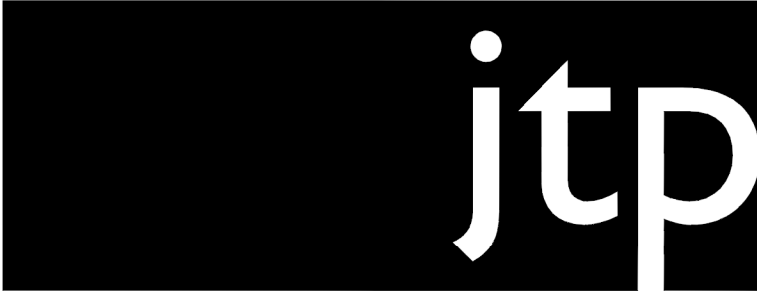
23-25 Great Sutton Street, London, EC1V 0DN T: +44 (0)20 7017 1780 F: +44 (0)20 7017 1781 W: www.jtp.co.uk

Project

North Littlehampton

Drawing Title

Parameter Plan Uses



JOHN THOMPSON & PARTNERS

Job Ref.	GR.L	Drawn	AF/ABL	Checked By	EH
Scale @A1	1:2500 (1:5000@A3)	Date	16/02/2011	Revision	-
Drawing No.	GR.L_006				



Document 2

F&B Analysis

Table 1: Population and F&B Expenditure within Study Area

	1	2	3	4	Zone 5	6	7	8	9	Total
Food & Beverage										
Population										
2025	14,570	12,602	7,357	22,898	8,161	38,836	28,365	5,167	10,661	148,617
2030	15,177	13,217	7,609	23,383	8,533	39,623	29,132	5,319	11,275	153,268
Expenditure per Capita (£)										
2023	1,678	1,426	1,656	1,845	1,874	1,903	1,799	2,225	1,840	-
2025	1,688	1,435	1,666	1,856	1,885	1,914	1,810	2,238	1,851	-
2030	1,714	1,456	1,691	1,884	1,914	1,943	1,837	2,272	1,879	-
Expenditure (£m)										
2025	24.60	18.08	12.26	42.50	15.39	74.35	51.34	11.57	19.73	269.80
2030	26.01	19.25	12.87	44.06	16.33	77.00	53.52	12.09	21.19	282.30

- Notes:
1. Population and expenditure data derived from Experian Location Analyst (October 2025) (2023 data)
 2. Expenditure forecasts in in line with the latest figures published by Experian (Retail Planner Briefing Note 22, March 2025) (Figure 2)
 3. Expenditure = population x expenditure per capita
 4. At 2023 prices

Table 2: Restaurant Market Shares

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Study Area Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Total	
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)
Within Study Area		24.60		18.08		12.26		42.50		15.39		74.35		51.34		11.57		19.73		269.80
Angmering Village Centre	1.3%	0.31	0.0%	0.00	1.2%	0.15	1.1%	0.47	15.4%	2.36	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	3.29
Arundel Town Centre	2.5%	0.62	4.9%	0.88	3.6%	0.44	6.5%	2.78	1.9%	0.30	0.0%	0.00	2.5%	1.30	50.6%	5.85	22.4%	4.43	6.2%	16.60
Barnham Village Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	6.1%	1.21	0.6%	1.52
Bognor Regis Town Centre	2.5%	0.62	4.9%	0.88	8.4%	1.03	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	3.01
Brighton City Centre	3.7%	0.91	3.3%	0.59	3.6%	0.44	1.1%	0.47	1.9%	0.30	0.0%	0.00	3.8%	1.95	0.0%	0.00	0.0%	0.00	1.7%	4.65
Broadwater District Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	0.3%	0.65	0.0%	0.00	0.0%	0.00	0.6%	1.66
Central London / West End	1.3%	0.31	0.0%	0.00	1.2%	0.15	0.0%	0.00	1.9%	0.30	0.0%	0.00	1.2%	0.91	0.0%	0.00	0.0%	0.00	0.8%	1.66
Chichester City Centre	2.5%	0.62	6.6%	1.20	12.0%	1.47	2.2%	0.94	9.6%	1.47	3.7%	2.72	1.3%	0.65	9.4%	1.09	18.4%	3.62	5.1%	13.79
East Preston Village Centre	0.0%	0.00	3.3%	0.59	0.0%	0.00	6.5%	2.78	7.6%	1.17	1.2%	0.91	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	5.45
Felpham Village Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	0.40	0.4%	1.18
Ferring Local Centre	0.0%	0.00	1.6%	0.29	0.0%	0.00	3.2%	1.37	3.9%	0.59	14.5%	10.82	0.0%	0.00	0.0%	0.00	0.0%	0.00	4.8%	13.07
Findon Valley Local Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.91	3.8%	1.95	0.0%	0.00	0.0%	0.00	1.1%	2.85
Ford Village Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.31
Goring-by-Sea District Centre	0.0%	0.00	3.3%	0.59	0.0%	0.00	3.2%	1.37	5.8%	0.89	19.3%	14.37	6.3%	3.24	0.0%	0.00	2.0%	0.40	7.7%	20.88
Littlehampton Town Centre	31.1%	7.64	41.1%	7.43	24.1%	2.96	13.0%	5.51	5.8%	0.89	2.4%	1.82	2.5%	1.30	3.7%	0.43	8.2%	1.61	11.0%	29.59
Portsmouth City Centre	0.0%	0.00	1.6%	0.29	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.5%	0.38	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.82
Rustington Local Centre	21.1%	5.20	11.5%	2.08	7.2%	0.88	34.6%	14.69	15.4%	2.36	3.7%	2.72	1.3%	0.65	1.9%	0.22	2.0%	0.40	10.8%	29.22
Shoreham by Sea Town Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.7%	1.87
Steyning Town Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.31
Storrington Town Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	0.0%	0.00	0.1%	0.22
The Strand Local Centre, Goring-by-the-Sea	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	1.22
Walberton Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	4.1%	0.81	0.3%	0.81
West Durrington District Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Worthing Town Centre	3.7%	0.91	4.9%	0.88	19.3%	2.37	6.5%	2.78	11.5%	1.77	32.7%	24.28	40.6%	20.86	0.0%	0.00	2.0%	0.40	20.1%	54.25
Yapton Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.30	0.0%	0.00	0.0%	0.00	0.0%	0.00	4.1%	0.81	0.4%	1.10
Abroad	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Amberley Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	5.7%	0.65	0.0%	0.00	0.5%	1.30
Arundel Restaurant, Northbrook College, Goring by Sea	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.15
Ashington Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.30	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.30
Binsted Village Centre	1.3%	0.31	0.0%	0.00	1.2%	0.15	0.0%	0.00	1.9%	0.30	0.0%	0.00	0.0%	0.00	0.0%	0.22	6.1%	1.21	0.8%	2.19
Bournemouth	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Brighton City Airport	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Bristol city centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Broadwater Local Centre, Worthing	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Burpham Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	0.47	0.0%	0.00	1.2%	0.91	0.0%	0.00	1.9%	0.22	0.0%	0.00	0.6%	1.60
Bury Village Centre	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	2.0%	0.40	0.3%	0.77
Cheltenham Town Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Clapham Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.2%	0.47
Climping Village Centre	1.3%	0.31	0.0%	0.00	3.6%	0.44	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	6.1%	1.21	1.0%	2.65
Crawley Town Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.29
Crossbush Lane, Arundel	1.3%	0.31	3.3%	0.59	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	1.9%	0.22	0.0%	0.00	0.7%	1.92
Durrington Local Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Eartham Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	0.0%	0.00	0.0%	0.00	2.0%	0.40	0.5%	1.31
Findon Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	2.5%	1.30	0.0%	0.00	0.0%	0.00	0.8%	2.20
Fitteworth Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	0.40	0.1%	0.40
Guildford Town Centre	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.15
Hainaker Hamlet Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	0.0%	0.00	0.1%	0.22
Haskins Garden Centre, Angmering	3.7%	0.91	1.6%	0.29	1.2%	0.15	2.2%	0.94	0.0%	0.00	2.5%	1.30	0.0%	0.00	0.0%	0.00	1.3%	0.65	1.3%	3.69
Highdown Garden Centre, Angmering	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	0.47	1.9%	0.30	3.7%	2.72	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	3.49
Horsham Town Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	3.7%	0.43	0.0%	0.00	0.3%	0.74
Hove Local Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	0.40	0.3%	0.87
Kirdford Village Centre	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.15
Lanes Heath Club, Golfer Lane, Rustington	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.1%	0.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.2%	0.47
Littlehampton Pier	5.0%	1.22	0.0%	0.00	2.4%	0.29	2.2%	0.94	1.9%	0.30	0.0%	0.00	0.0%	0.00	1.9%	0.22	0.0%	0.00	1.1%	2.98
Loxwood Village Centre	1.3%	0.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.31
MacDonald Elmers Court Hotel, Lyminster	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.15
Manor Retail Park, Rustington Bypass	0.0%	0.00	0.0%	0.00	1.2%	0.15	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.1%	0.15
Miller & Carter, Lancing	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.30	2.4%	1.82	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.8%	2.11
Monmouth Town Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	0.0%	0.00	0.1%	0.22
Old Barn Garden Centre, Dial Post	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.2%	0.91	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.6%	1.56
Pagham Village Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.3%	0.65	0.0%	0.00	0.0%	0.00	0.2%	0.65
Patching Village Centre	0.0%	0.00	1.6%	0.29	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	3.8%	1.95	0.0%	0.00	0.0%	0.00	0.8%	2.24
Portsedale Local Centre	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.9%	0.22	0.0%	0.00	0.1%	0.22
Pulborough Garden Centre, Pulborough	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%													

Table 3a: Turnover of F&B Floorspace (2025)

Retailer	Gross Floorspace (sq m)	Sales Density (£ per sqm)	Turnover	
			2025	2030
F&B Units	523	8,000	4.18	4.20

Table 3b: Trade Draw of Proposal (F&B) (2030)

Retailer	Survey Zone									Total
	1	2	3	4	5	6	7	8	9	
Available Expenditure (£m)	26.01	19.25	12.87	44.06	16.33	77.00	53.52	12.09	21.19	282.30
Proportion of Turnover from Zone	20.0%	20.0%	10.0%	20.0%	7.5%	7.5%	5.0%	5.0%	5.0%	100.0%
Turnover from Zone (£m)	0.84	0.84	0.42	0.84	0.32	0.32	0.21	0.21	0.21	4.20
Market Share of Proposal from Zone	3.2%	4.4%	3.3%	1.9%	1.9%	0.4%	0.4%	1.7%	1.0%	1.5%

- Notes:
1. Sales densities based on professional assumptions for then nature of occupiers proposed
 2. Turnover = floorspace x sales density. Allows for increased turnover efficiency post 2025 in line with the latest estimates identified by Experian for leisure uses (Figure 2, Retail Planner Briefing Note 22 - Leisure) (March 2025)
 3. Available expenditure taken from Table 1
 4. Turnover derived from Zone consistent with that identified by Nexus Planning for convenience goods shopping for the proposed development (Table 16, Appendix A)
 5. Market share of proposal from zone = turnover from zone expressed as a proportion of available expenditure
 6. At 2023 prices

Table 4: Impact of Proposal (F&B) (2030)

	Turnover Pre-Development (£m)		Trade Diversion to Proposal		Turnover Post Development (2030)	Impact	Change in Turnover Post Development (2025-2030 (£m))
	2025	2030	(%)	(£m)			
Proposal				4.20	4.20		
<u>Littlehampton Town Centre</u>	29.59	30.96	14.5%	0.61	30.35	-2.0%	0.76
<u>The Strand Local Centre</u>	1.22	1.28	0.0%	0.00	1.28	0.0%	0.06
<u>Rustington Local Service Centre</u>	29.22	30.57	15.0%	0.63	29.94	-2.1%	0.72
<u>West Durrington District Centre</u>	0.65	0.68	0.0%	0.00	0.68	0.0%	0.03
<u>Arundel Local Service Centre</u>	16.60	17.37	3.0%	0.13	17.24	-0.7%	0.64
Elsewhere	192.53	201.45	67.5%	2.84	198.61	-1.4%	6.08
Total	269.80	282.30	100.0%	4.20	282.30	-	-

- Notes:**
1. Turnover pre-development derived from Table 2 for 2025, and 'rolled forward' at existing market shares to 2030
 2. Turnover of the proposal taken from Table 3a
 3. Trade diversion to proposal based on professional assumptions drawing on findings of the household survey and the location and strength of competing provision
 4. Turnover post development = turnover pre development *minus* trade diversion to the proposal
 5. Impact = reduction in turnover expressed as a proportion of turnover pre development
 6. Change in turnover = turnover pre development in 2028 *minus* turnover post development
 7. At 2023 prices

Table 5: Impact of Proposal (Retail and F&B) (2030)

	Turnover Pre-Development (£m)		Trade Diversion to Proposal		Turnover Post Development (2030)	Impact	Change in Turnover Post Development (2025-2030 (£m))
	2025	2030	(%)	(£m)			
Proposal				22.48	22.48		
<u>Littlehampton Town Centre</u>	72.66	76.85	14.5%	2.26	74.60	-2.9%	1.93
<u>The Strand Local Centre</u>	5.03	5.17	0.0%	0.01	5.17	-0.1%	0.13
<u>Rustington Local Service Centre</u>	64.84	69.34	15.0%	0.89	68.44	-1.3%	3.60
<u>West Durrington District Centre</u>	103.73	108.45	0.0%	1.49	106.96	-1.4%	3.23
<u>Arundel Local Service Centre</u>	25.83	27.12	3.0%	0.19	26.93	-0.7%	1.11

- Notes:**
- 1. Turnover pre-development derived from Table 4 for F&B and Document 2 of the Supplementary Retail Impact Assessment (July 2025) for retail
 - 2. Turnover of the proposal taken from Table 3a for F&B and Document 2 of the Supplementary Retail Impact Assessment (July 2025) for retail
 - 3. Trade diversion to proposal derived from Table 5 for F&B and Document 2 of the Supplementary Retail Impact Assessment (July 2025) for retail
 - 4. Turnover post development = turnover pre development *minus* trade diversion to the proposal
 - 5. Impact = reduction in turnover expressed as a proportion of turnover pre development
 - 6. Change in turnover = turnover pre development in 2028 *minus* turnover post development
 - 7. At 2023 prices