RECAP

The Retail Capacity forecasting Model

Project:	**Dartford Retail & Leisure Study 2006**	Number:	38766
Client:	SEEDA		
Date of Latest Revision:	31-May-06	File:	Dartford RECAP Model 2006

Retail Locations Modelled:

- Dartford Town Centre
- Non-Central Food Stores & Retail Warehouses in Dartford

Scenarios Modelled:

1	Baseline - No change in the market shares indicated by the Household Interview Survey 2005
2	Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Notes:

Donaldsons

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	Census	Base Year	Forecasting Years		
		2001	2005	2006	2011	2016
1	DA8 3, DA7 6	20,973	21,050	21,137	21,566	22,038
2	DA6 7, DA5 1, DA5 3, DA14 4	29,152	29,412	29,544	30,229	31,039
3	DA8 2, DA1 5	19,819	19,950	20,026	21,780	22,528
4	DA1 1, DA1 2, DA1 3, DA1 4	37,700	37,956	38,123	38,981	39,836
5	DA5 2, DA2 7, DA14 5, BR8 7	35,198	35,323	35,442	36,052	36,816
6	BR8 8, DA4 0	10,287	10,224	10,234	10,291	10,414
7	DA4 9, DA2 8	7,058	7,112	7,138	8,057	8,774
8	DA2 6, DA9 9, DA10 0	23,948	23,834	23,956	27,055	31,359
9	DA3 7, DA13 9	13,624	13,571	13,621	13,884	14,225
10	DA11 0, 7, 8 & 9; DA12 1, 2, 4 & 5	76,572	75,975	76,089	76,599	77,608
TOTAL		274,331	274,407	275,310	284,494	294,637

Sources:

MapInfo TargetPro Report, 7 November 2005. Dartford Borough Council for new housing at Eastern Quarry.

Notes:

Zone 3 includes boosted population figures to accommodate an additional 1,350 dwellings between 2011 and 2016 from The Bridge development. Population figures have been boosted in Zone 7 to reflect the Eastern Quarry permission of 950 dwellings between 2011 and 2016. In Zone 8, population figures have been boosted to reflect the Eastern Quarry and Ebbsfleet developments of 3,870 between 2011 and 2016. An average occupancy rate of 2.3 persons per dwelling has been used.

Table: **2**

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2003	Price Basis (Year):	2003
Including Special Forms of Trading:			
Convenience Goods (£):	1,540.00	Comparison Goods (£):	2,829.00
Reduction to exclude Special Forms of Trading at:			
Convenience Goods:	1.6 %	Comparison Goods:	5.3 %
Excluding Special Forms of Trading:			
Convenience Goods (£):	**1,515.36**	Comparison Goods (£):	**2,679.06**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	1.59	% 2003 to 2004	0.80	% pa	2004 to	2016
Comparison Goods:	9.30	% 2003 to 2004	3.80	% pa	2004 to	2016

	Convenience Goods (£)				Comparison Goods (£)			
PER CAPITA EXPENDITURE IN:	2005	2006	2011	2016	2005	2006	2011	2016
(Excluding SFT)	1,551.77	1,564.18	1,627.76	1,693.92	3,039.49	3,154.99	3,801.76	4,581.12

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2003 on:

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT (£)	752	304	79	87	375	230	363	639	2,829
SFT Reduction (%)	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3	5.3
Excluding SFT (£)	712.14	287.89	74.81	82.39	355.13	217.81	343.76	605.13	2,679.06

Per Capita Comparison Goods Expenditure in 2005 on:

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Excluding SFT (£)	807.95	326.62	84.88	93.47	402.90	247.11	390.01	686.54	3,039.49

Sources:

MapInfo TargetPro Report 7 November 2005. MapInfo/Oxford Economic Forecasting Information Brief 05/2.

Notes:

Growth 2001 to 2004 is the actual national average growth. Growth projections 2004 to 2016 apply the 1993 to 2004 average annual trend to the actual 2004 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2004 to the actual 2004 expenditure (comparison goods).

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	32,665	33,062	35,104	37,331	63,981	66,687	81,989	100,959
2	45,641	46,212	49,206	52,578	89,397	93,211	114,923	142,193
3	30,958	31,324	35,453	38,161	60,638	63,182	82,802	103,203
4	58,899	59,631	63,452	67,479	115,367	120,278	148,196	182,493
5	54,813	55,438	58,684	62,363	107,364	111,819	137,061	168,658
6	15,865	16,008	16,751	17,640	31,076	32,288	39,124	47,708
7	11,036	11,165	13,115	14,862	21,617	22,520	30,631	40,195
8	36,985	37,472	44,039	53,120	72,443	75,581	102,857	143,659
9	21,059	21,306	22,600	24,096	41,249	42,974	52,784	65,166
10	117,896	119,017	124,685	131,462	230,925	240,060	291,211	355,531
TOTALS	425,817	430,636	463,088	499,092	834,057	868,600	1,081,578	1,349,766

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2005

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)	Total comprsn gds (£000)
1	17,007	6,875	1,787	1,968	8,481	5,202	8,210	14,452	63,981
2	23,763	9,607	2,496	2,749	11,850	7,268	11,471	20,193	89,397
3	16,119	6,516	1,693	1,865	8,038	4,930	7,781	13,697	60,638
4	30,667	12,397	3,222	3,548	15,293	9,379	14,803	26,058	115,367
5	28,539	11,537	2,998	3,302	14,232	8,729	13,776	24,251	107,364
6	8,260	3,339	868	956	4,119	2,526	3,987	7,019	31,076
7	5,746	2,323	604	665	2,865	1,757	2,774	4,883	21,617
8	19,257	7,785	2,023	2,228	9,603	5,890	9,295	16,363	72,443
9	10,965	4,433	1,152	1,269	5,468	3,354	5,293	9,317	41,249
10	61,384	24,815	6,449	7,102	30,610	18,774	29,631	52,160	230,925
TOTALS	221,708	89,626	23,291	25,650	110,559	67,809	107,021	188,392	834,057

Sources: RECAP Tables 1 and 2

Scenario 1

Dartford Town Centre

Table: **5**

CONVENIENCE GOODS MARKET SHARES IN 2005

2005 Dartford Retail & Leisure Study 2006

Dartford Town Centre
Indicated by household interview survey

Zones	Main Food 01-Feb-06 Q2	Top-up convenience Q5	**WEIGHTED AVERAGE**
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	41.0	16.0	33.5
2	40.8	26.7	36.6
3	77.0	37.0	65.0
4	70.0	41.5	61.5
5	44.0	32.0	40.4
6	18.8	6.3	15.1
7	76.3	31.3	62.8
8	45.0	40.0	43.5
9	53.8	27.5	45.9
10	48.2	27.6	42.0

Sources: Household Interview Survey.
Expenditure weighting by Donaldsons.

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2005

2005 Allocations to
Dartford Town Centre
Indicated by Household Interview Survey

Zones	Clothing & footwear Q6	Furniture/ florcvrgs etc Q7	Household Textiles Q8	Household Appliances Q9	Audio-visual equipment Q10	Hardware, DIY, garden products Q11	Chemists, medcl & beauty goods Q12	All other comparison gds Q13	**WEIGHTED AVERAGE**
	Expenditure weighting								
	807.95	326.62	84.88	93.47	402.90	247.11	390.01	686.54	3,039.49
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	23.4	21.4	19.1	18.3	16.9	22.2	25.6	23.9	22.3
2	10.8	12.0	10.1	10.1	9.3	10.0	15.2	12.3	11.5
3	54.8	47.6	48.9	44.6	46.0	47.8	72.7	63.8	56.1
4	38.1	34.9	50.8	36.4	41.0	41.4	64.1	45.5	43.7
5	34.3	33.6	31.6	36.4	43.9	36.6	46.6	43.1	39.2
6	40.3	29.2	36.1	18.3	22.2	22.7	42.9	43.8	35.6
7	31.2	18.8	31.6	28.8	27.1	21.7	35.1	0.0	21.9
8	22.2	25.7	30.4	33.9	35.1	45.5	48.7	35.1	33.1
9	23.1	28.4	27.0	34.2	27.5	34.3	22.8	25.3	26.1
10	20.6	24.5	23.4	22.2	23.9	22.7	29.5	28.0	24.6

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Dartford Town Centre**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Market shares adjustment factors: Convenience Goods: 75 % of survey indicated figures
Comparison Goods: 60 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	25	25	25	25	13	13	13	13
2	27	27	27	27	7	7	7	7
3	49	49	49	49	34	34	34	34
4	46	46	46	46	26	26	26	26
5	30	30	30	30	24	24	24	24
6	11	11	11	11	21	21	21	21
7	47	47	47	47	13	13	13	13
8	33	33	33	33	20	20	20	20
9	34	34	34	34	16	16	16	16
10	32	32	32	32	15	15	15	15

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **8**

COMPARISON GOODS SALES BY GOODS TYPE IN 2005

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2005 Sales in **Dartford Town Centre** By Comparison Goods Type.							
1	2,388	883	205	216	860	693	1,261	2,072
2	1,540	692	151	167	661	436	1,046	1,485
3	5,300	1,861	497	499	2,218	1,414	3,394	5,243
4	7,010	2,596	982	775	3,762	2,330	5,693	7,114
5	5,873	2,326	568	721	3,749	1,917	3,852	6,271
6	1,997	585	188	105	549	344	1,026	1,845
7	1,076	262	114	115	466	229	584	0
8	2,565	1,200	369	453	2,022	1,608	2,716	3,446
9	1,520	755	187	260	902	690	724	1,414
10	7,587	3,648	905	946	4,390	2,557	5,245	8,747
TOTALS	36,856	14,808	4,167	4,257	19,579	12,218	25,542	37,638
MARKET SHARES	17%	17%	18%	17%	18%	18%	24%	20%

Sources: RECAP Model.
Notes: Based on unadjusted market shares from Household Interview Survey.

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **Dartford Town Centre**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	8,166	8,266	8,776	9,333	8,318	8,669	10,659	13,125
2	12,323	12,477	13,286	14,196	6,258	6,525	8,045	9,954
3	15,169	15,349	17,372	18,699	20,617	21,482	28,153	35,089
4	27,094	27,430	29,188	31,040	29,995	31,272	38,531	47,448
5	16,444	16,631	17,605	18,709	25,767	26,837	32,895	40,478
6	1,745	1,761	1,843	1,940	6,526	6,781	8,216	10,019
7	5,187	5,248	6,164	6,985	2,810	2,928	3,982	5,225
8	12,205	12,366	14,533	17,529	14,489	15,116	20,571	28,732
9	7,160	7,244	7,684	8,193	6,600	6,876	8,445	10,427
10	37,727	38,086	39,899	42,068	34,639	36,009	43,682	53,330
TOTALS	143,220	144,857	156,349	168,692	156,018	162,494	203,178	253,826

Sources: RECAP Model.
Notes: Based on adjusted market shares.

Table: **10**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2005

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op, Hythe Street, Dartford	1,393	95	1,323	6,526	8,636
Iceland, High Street, Dartford	780	93	725	4,816	3,494
Sainsburys, Priory Market Place, Dartford	2,710	85	2,304	9,662	22,256
Waitrose, Orchards Shopping Centre, Dartford	2,007	88	1,766	12,174	21,501
Other Convenience Good Shops	3,520	90	3,168	5,000	15,840
ALL STORES	10,410		9,286	7,724	71,727

Sources: IGD, Donaldsons, Verdict Research.

Table: **11**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Tesco	4,000	100	4,000	13,727	54,908
ALL STORES	4,000		4,000	13,727	54,908
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Tesco			4,000	5,625	22,500
ALL STORES AND SCHEMES	-		4,000	5,625	22,500

Sources:
Donaldsons, based on Verdict Research and Retail Rankings.

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Dartford Town Centre**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Growth in sales per sq m from shop floorspace existing in 2005 Comparison Goods: 1.50 % pa to 2016

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2006	2011	2016	2005	2006	2011	2016
Residents' Spending £000	143,220	144,857	156,349	168,692	156,018	162,494	203,178	253,826
Plus visitors' spending (%)								
Total spending (£000)	143,220	144,857	156,349	168,692	156,018	162,494	203,178	253,826
Existing shop floorspace (sq m net)	9,286	9,286	9,286	9,286	31,308	31,308	31,308	31,308
Sales per sq m net (£)	15,423	7,724	7,724	7,724	4,983	5,058	5,449	5,870
Sales from extg flrspce (£000)	143,220	71,727	71,727	71,727	156,018	158,359	170,597	183,782
Available spending to support new shops (£000)	0	73,130	84,622	96,965	0	4,135	32,581	70,044
Less sales capacity of committed new floorspace (£000)	0	54,908	54,908	54,908	0	22,500	24,239	26,112
Net available spending for new shops (£000)	0	18,222	29,714	42,057	0	(18,365)	8,342	43,932
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	5,000	5,100	5,500	6,000
Capacity for new shop flrspc (sq m net)	**0**	**1,458**	**2,377**	**3,365**	**0**	**(3,601)**	**1,517**	**7,322**

Market Share of Catchment Area Expenditure	34%	34%	34%	34%	19%	19%	19%	19%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Non-Central Food Stores & Retail Warehouses in Dartford

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2005

2005	Dartford Retail & Leisure Study 2006		
Non-Central Food Stores & Retail Warehouses in Dartford			
Indicated by household interview survey			
Zones	Main Food 01-Feb-06 Q2	Top-up convenience Q5	**WEIGHTED AVERAGE**
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	10.0	0.0	7.0
2	9.2	3.3	7.4
3	13.0	1.0	9.4
4	12.0	7.5	10.7
5	6.0	2.7	5.0
6	25.0	10.0	20.5
7	18.8	11.3	16.6
8	31.7	25.0	29.7
9	32.5	15.0	27.3
10	22.4	11.2	19.0

Sources: Household Interview Survey.
Expenditure weighting by Donaldsons.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2005

	2005 Allocations to								
	Non-Central Food Stores & Retail Warehouses in Dartford								
	Indicated by Household Interview Survey								
	Clothing & footwear Q6	Furniture/ florcvrgs etc Q7	Household Textiles Q8	Household Appliances Q9	Audio-visual equipment Q10	Hardware, DIY, garden products Q11	Chemists, medcl & beauty goods Q12	All other comparison gds Q13	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	807.95	326.62	84.88	93.47	402.90	247.11	390.01	686.54	3,039.49
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	11.7	29.2	20.2	23.7	19.1	27.2	5.6	9.1	15.0
2	6.3	5.0	7.3	6.1	7.2	8.0	2.7	4.7	5.6
3	4.3	30.5	27.3	30.4	23.0	32.2	2.0	5.3	13.2
4	2.6	30.8	11.5	23.3	15.0	35.4	4.6	2.1	11.0
5	10.3	14.8	15.8	10.7	6.2	12.2	3.4	5.8	8.7
6	4.2	25.0	15.3	32.4	23.6	38.7	7.8	6.9	14.0
7	3.9	42.0	17.1	32.9	35.7	55.1	3.9	4.2	17.7
8	10.3	18.1	17.0	19.3	18.0	11.8	5.9	8.8	11.8
9	3.9	4.1	9.5	13.2	17.4	13.7	7.6	6.3	8.0
10	4.9	12.6	12.3	14.2	10.4	13.5	1.8	6.2	7.5

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	7	7	7	7	15	15	15	15
2	7	7	7	7	6	6	6	6
3	9	9	9	9	13	13	13	13
4	11	11	11	11	11	11	11	11
5	5	5	5	5	9	9	9	9
6	21	21	21	21	14	14	14	14
7	17	17	17	17	18	18	18	18
8	30	30	30	30	12	12	12	12
9	27	27	27	27	8	8	8	8
10	19	19	19	19	8	8	8	8

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2005

Catchment Zones	2005 Sales in **Non-Central Food Stores & Retail Warehouses in Dartford** By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	1,990	2,008	361	466	1,620	1,413	456	1,314
2	1,499	480	183	167	856	581	307	953
3	693	1,987	462	567	1,848	1,588	157	729
4	791	3,818	371	827	2,298	3,317	684	558
5	2,931	1,712	473	354	875	1,066	471	1,416
6	344	835	133	310	973	977	311	481
7	224	976	103	219	1,023	968	108	207
8	1,976	1,409	343	429	1,730	696	547	1,435
9	422	180	109	167	951	459	402	590
10	2,977	3,122	796	1,008	3,193	2,535	536	3,239
TOTALS	13,848	16,526	3,335	4,513	15,367	13,600	3,980	10,921
MARKET SHARES	6%	18%	14%	18%	14%	20%	4%	6%

Sources: RECAP Model.
Notes: Based on unadjusted market shares from Household Interview Survey.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	2,287	2,314	2,457	2,613	9,597	10,003	12,298	15,144
2	3,195	3,235	3,444	3,680	5,364	5,593	6,895	8,532
3	2,786	2,819	3,191	3,434	7,883	8,214	10,764	13,416
4	6,479	6,559	6,980	7,423	12,690	13,231	16,302	20,074
5	2,741	2,772	2,934	3,118	9,663	10,064	12,335	15,179
6	3,332	3,362	3,518	3,705	4,351	4,520	5,477	6,679
7	1,876	1,898	2,230	2,527	3,891	4,054	5,514	7,235
8	11,095	11,241	13,212	15,936	8,693	9,070	12,343	17,239
9	5,686	5,753	6,102	6,506	3,300	3,438	4,223	5,213
10	22,400	22,613	23,690	24,978	18,474	19,205	23,297	28,443
TOTALS	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154

Sources: RECAP Model.
Notes:

Table: **18**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2005

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
ASDA, Crossways Boulevard, Greenhithe	2,572	56	1,440	13,747	19,800
Waitrose, Station Road, Longfield	1,379	88	1,214	12,174	14,773
ALL STORES	3,951		2,654	13,028	34,573

Sources: IGD, Donaldsons, Verdict Research.

Table: **19**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & MAIN FOOD STORES*

Net to gross ratio: 85 % Date of sales densities: 2003

Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2003 (£per sqm net)	Sales 2003 (£000)
Wickes, Overy Street	2,809	2,388	2,936	7,010
Homebase, Princes Road	4,004	3,403	1,619	5,510
Focus, Princes Road	2,796	2,377	1,074	2,552
B&Q, Prospect Place	8,756	7,443	2,239	16,664
Carpetright, Prospect Place	1,396	1,187	1,454	1,725
Allied Carpets, Prospect Place	2,124	1,805	1,341	2,421
MFI, Prospect Place	2,787	2,369	2,580	6,112
Unit 5A (Vacant), Prospect Place	700	595	2,500	1,488
SCS Upholstery, Prospect Place	2,300	1,955	1,530	2,991
Matalan, Prospect Place	4,650	3,953	2,757	10,897
TKMaxx, Prospect Place	3,008	2,557	2,998	7,665
Choices Video, Prospect Place	160	136	2,250	306
The Bath Store, Prospect Place	780	663	2,000	1,326
Asda, Greenhithe*	n/a	1,132	7,223	8,174
Waitrose, Station Road, Longfield*	n/a	165	7,896	1,307
TOTALS at the date of the Household Interview Survey of Shopping Patterns	36,270	32,127	**2,370**	76,149

Sources: Retail Rankings', Mintel, with VAT added for compatibility with expenditure.
Donaldsons. Verdict Research.

Notes: * Comparison goods floorspace in food stores

Prospect Place treated as a non-central retail park for forecasting convenience, although it is on the edge of Dartford town centre. Wickes also treated as a non-central retail warehouse.

Table: **20**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Unimplemented planning permissions: Eastern Quarry	2,763	80	2,210	12,000	26,525
ALL STORES	2,763		2,210	12,000	26,525
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Unimplemented planning permissions: Eastern Quarry			553	5,500	3,039
ALL STORES AND SCHEMES	-		**553**	5,500	**3,039**

Sources: Dartford BC. Donaldsons, based on Verdict Research and Retail Rankings.

Notes: Includes only the comparison goods floorspace in the permitted food store. The unimplemented planning permission for additional comparison goods floorspace has not been included because details of the nature of this floorspace are not yet available. When details of unit sizes and occupancy are known, this floorspace (adjusted as necessary for its sales density) should be subtracted from the forecast retail capacity in Table 21)

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Baseline - No change in the market shares indicated by the Household Interview Survey 2005

Growth in sales per sq m from shop floorspace existing in 2005 Comparison Goods: 1.50 % pa to 2016

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2006	2011	2016	2005	2006	2011	2016
Residents' Spending £000	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154
Plus visitors' spending (%)								
Total spending (£000)	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154
Existing shop floorspace (sq m net)	2,654	2,654	2,654	2,654	32,127	32,127	32,127	32,127
Sales per sq m net (£)	23,316	13,028	13,028	13,028	2,612	2,479	2,670	2,876
Sales from extg flrspce (£000)	61,877	34,573	34,573	34,573	83,906	79,627	85,781	92,410
Available spending to support new shops (£000)	0	27,993	33,184	39,346	0	7,763	23,667	44,744
Less sales capacity of committed new floorspace (£000)	0	26,525	26,525	26,525	0	3,039	3,274	3,527
Net available spending for new shops (£000)	0	1,468	6,659	12,821	0	4,724	20,393	41,217
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	2,500	2,550	2,750	3,000
Capacity for new shop flrspc (sq m net)	**0**	**117**	**533**	**1,026**	**0**	**1,852**	**7,416**	**13,739**

Market Share of Catchment Area Expenditure	15%	15%	15%	15%	10%	10%	10%	10%

Sources: RECAP Model. Donaldsons estimates.

Notes: The permitted comparison goods shops at Eastern Quarry should be subtracted from these comparison goods forecasts.

Scenario 2

Dartford Town Centre

Table: **22**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: Dartford Retail ‹ Location: **Dartford Town Centre**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Market shares adjustment factors:		
Convenience Goods:	75	% of survey indicated figures
Comparison Goods:	60	% of survey indicated figures

Catchment Zone	01-Feb-06							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	25	25	27	27	13	13	17	17
2	27	27	29	29	7	7	9	9
3	49	49	53	53	34	34	40	40
4	46	46	52	52	26	26	34	34
5	30	30	33	33	24	24	30	30
6	11	11	12	12	21	21	23	23
7	47	47	49	49	13	13	15	15
8	33	33	35	35	20	20	24	24
9	34	34	35	35	16	16	17	17
10	32	32	33	33	15	15	16	16

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **23**

FORECAST RETAIL SALES

Scenario: 2 Location: **Dartford Town Centre**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	8,166	8,266	9,478	10,079	8,318	8,669	13,938	17,163
2	12,323	12,477	14,270	15,248	6,258	6,525	10,343	12,797
3	15,169	15,349	18,790	20,225	20,617	21,482	33,121	41,281
4	27,094	27,430	32,995	35,089	29,995	31,272	50,387	62,048
5	16,444	16,631	19,366	20,580	25,767	26,837	41,118	50,598
6	1,745	1,761	2,010	2,117	6,526	6,781	8,998	10,973
7	5,187	5,248	6,426	7,283	2,810	2,928	4,595	6,029
8	12,205	12,366	15,414	18,592	14,489	15,116	24,686	34,478
9	7,160	7,244	7,910	8,434	6,600	6,876	8,973	11,078
10	37,727	38,086	41,146	43,382	34,639	36,009	46,594	56,885
TOTALS	143,220	144,857	167,804	181,028	156,018	162,494	242,753	303,330

Sources: RECAP Model.

Table: **24**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Dartford Town Centre**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Growth in sales per sq m from shop floorspace existing in 2005 Comparison Goods: 1.50 % pa to 2016

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2006	2011	2016	2005	2006	2011	2016
Residents' Spending £000	143,220	144,857	167,804	181,028	156,018	162,494	242,753	303,330
Plus visitors' spending (%)								
Total spending (£000)	143,220	144,857	167,804	181,028	156,018	162,494	242,753	303,330
Existing shop floorspace (sq m net)	9,286	9,286	9,286	9,286	31,308	31,308	31,308	31,308
Sales per sq m net (£)	15,423	7,724	7,724	7,724	4,983	5,058	5,449	5,870
Sales from extg flrspce (£000)	143,220	71,727	71,727	71,727	156,018	158,359	170,597	183,782
Available spending to support new shops (£000)	0	73,130	96,077	109,301	0	4,135	72,156	119,549
Less sales capacity of committed new floorspace (£000)	0	54,908	54,908	54,908	0	22,500	24,239	26,112
Net available spending for new shops (£000)	0	18,222	41,169	54,393	0	(18,365)	47,917	93,437
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	5,000	5,100	5,500	6,000
Capacity for new shop flrspc (sq m net)	**0**	**1,458**	**3,294**	**4,351**	**0**	**(3,601)**	**8,712**	**15,573**

Market Share of Catchment Area Expenditure	34%	34%	36%	36%	19%	19%	22%	22%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Non-Central Food Stores & Retail Warehouses in Dartford

Table: **25**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: Dartford Retail ‹ Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Market shares adjustment factors:	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	01-Feb-06							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	7	7	7	7	15	15	15	15
2	7	7	7	7	6	6	6	6
3	9	9	9	9	13	13	13	13
4	11	11	11	11	11	11	11	11
5	5	5	5	5	9	9	9	9
6	21	21	21	21	14	14	14	14
7	17	17	17	17	18	18	18	18
8	30	30	30	30	12	12	12	12
9	27	27	27	27	8	8	8	8
10	19	19	19	19	8	8	8	8

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **26**

FORECAST RETAIL SALES

Scenario: 2 Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	2,287	2,314	2,457	2,613	9,597	10,003	12,298	15,144
2	3,195	3,235	3,444	3,680	5,364	5,593	6,895	8,532
3	2,786	2,819	3,191	3,434	7,883	8,214	10,764	13,416
4	6,479	6,559	6,980	7,423	12,690	13,231	16,302	20,074
5	2,741	2,772	2,934	3,118	9,663	10,064	12,335	15,179
6	3,332	3,362	3,518	3,705	4,351	4,520	5,477	6,679
7	1,876	1,898	2,230	2,527	3,891	4,054	5,514	7,235
8	11,095	11,241	13,212	15,936	8,693	9,070	12,343	17,239
9	5,686	5,753	6,102	6,506	3,300	3,438	4,223	5,213
10	22,400	22,613	23,690	24,978	18,474	19,205	23,297	28,443
TOTALS	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154

Sources: RECAP Model.

Table: **27**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Non-Central Food Stores & Retail Warehouses in Dartford**

Addition of a 12,150 sq m gross Tesco store in Dartford town centre (estimated by 2010); and a major extension of The Orchards Centre comprising mainly comparison goods retailing open by 2011.

Growth in sales per sq m from shop floorspace existing in 2005 Comparison Goods: 1.50 % pa to 2016

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2006	2011	2016	75	2006	2011	2016
Residents' Spending £000	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154
Plus visitors' spending (%)								
Total spending (£000)	61,877	62,567	67,757	73,920	83,906	87,390	109,448	137,154
Existing shop floorspace (sq m net)	2,654	2,654	2,654	2,654	32,127	32,127	32,127	32,127
Sales per sq m net (£)	23,316	13,028	13,028	13,028	2,612	2,479	2,670	2,876
Sales from extg flrspce (£000)	61,877	34,573	34,573	34,573	83,906	79,627	85,781	92,410
Available spending to support new shops (£000)	0	27,993	33,184	39,346	0	7,763	23,667	44,744
Less sales capacity of committed new floorspace (£000)	0	26,525	26,525	26,525	0	3,039	3,274	3,527
Net available spending for new shops (£000)	0	1,468	6,659	12,821	0	4,724	20,393	41,217
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	2,500	2,550	2,750	3,000
Capacity for new shop flrspc (sq m net)	**0**	**117**	**533**	**1,026**	**0**	**1,852**	**7,416**	**13,739**

Market Share of Catchment Area Expenditure	15%	15%	15%	15%	10%	10%	10%	10%

Sources: RECAP Model. Donaldsons estimates.

Notes: The permitted comparison goods shops at Eastern Quarry should be subtracted from these comparison goods forecasts.

Total Market Shares

Table: **28**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2005

SHOPPING LOCATION	COMPARISON GOODS TYPE							
Dartford Retail & Leisure Study 2006	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds
Dartford Town Centre	17%	17%	18%	17%	18%	18%	24%	20%
Non-Central Food Stores & Retail Warehouses in Dartford	6%	18%	14%	18%	14%	20%	4%	6%
01-Feb-06 **TOTALS**	**23%**	**35%**	**32%**	**34%**	**32%**	**38%**	**28%**	**26%**

Sources: RECAP Model
Notes: Based on unadjusted household interview survey results.

Table: **29**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Dartford

Catchment Zones	Town Centre and Non-Central Foodstores and Retail Warehouses							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	32	32	32	32	28	28	28	28
2	34	34	34	34	13	13	13	13
3	58	58	58	58	47	47	47	47
4	57	57	57	57	37	37	37	37
5	35	35	35	35	33	33	33	33
6	32	32	32	32	35	35	35	35
7	64	64	64	64	31	31	31	31
8	63	63	63	63	32	32	32	32
9	61	61	61	61	24	24	24	24
10	51	51	51	51	23	23	23	23

Sources: RECAP Model
Notes: Based on adjusted household interview survey results.

Table: **30**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Dartford

Catchment Zones	Town Centre and Non-Central Foodstores and Retail Warehouses							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)
1	32	32	34	34	28	28	32	32
2	34	34	36	36	13	13	15	15
3	58	58	62	62	47	47	53	53
4	57	57	63	63	37	37	45	45
5	35	35	38	38	33	33	39	39
6	32	32	33	33	35	35	37	37
7	64	64	66	66	31	31	33	33
8	63	63	65	65	32	32	36	36
9	61	61	62	62	24	24	25	25
10	51	51	52	52	23	23	24	24

Sources: RECAP Model