Appendix 4

The REASN Model Forecasts

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TABLE 1a
POPULATION GROWTH IN ASHFORD (Catchment Zone 1)
SCENARIO B: MIXED URBAN CONSOLIDATION/GROWTH STRATEGY

	2001	2003	2006	2011	2016	2031
Housing Growth (Cumulative)	-	1,280	3,200	7,925	13,050	30,780
Average Occupancy Rate		2.44	2.44	2.44	2.44	2.44
Population Growth (Cumulative)	-	3,123	7,808	19,337	31,842	75,103
Trend based population of existing urban area	52,912	53,166	53,548	54,087	54,567	56,259
ZONE 1 POPULATION	52,912	56,289	61,356	73,424	86,409	131,362

SOURCE: Scenario B in 'Ashford's Future - The Overarching Report', (Dec 2002)
Ashford Borough Council for Occupancy Rate.
MapInfo Area Profile Report for Ashford, for trend based projections.
NOTES: The trend-based figure for 2003 is a linear interpolation by CB Richard Ellis.
The trend based projection for 2031 is a 'least mean squares' extrapolation by CB Richard Ellis.

TABLE 1b
CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	2001	2003	2006	2011	2016	2031
1	TN23, TN24	52,912	56,289	61,356	73,424	86,409	131,362
2	TN25, TN26	24,539	24,656	24,832	25,086	25,307	26,094
3	CT18, CT19, CT20, CT21	72,178	72,523	73,041	73,780	74,430	76,735
4	TN28, TN29	20,377	20,475	20,622	20,830	21,014	21,666
5	TN27, TN30	19,073	19,164	19,300	19,496	19,669	20,279
6	TN17-5, TN18-5, TN31	23,015	23,138	23,322	23,603	23,886	24,759
7	CT4-7, CT4-8, ME13-0, ME17-2	13,929	13,996	14,096	14,239	14,365	14,811
TOTAL		226,023	230,241	236,569	250,458	265,080	315,705

SOURCE: Table 1a for Zone 1.
MapInfo Area Profile Report for Zones 2 to 7.
NOTES: For Zones 2 to 7, the figures for 2003 are linear interpolations and the projections for 2031 are least mean squares' trend projections, by CB Richard Ellis.

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TABLE 2a

CATCHMENT AREA RETAIL EXPENDITURE FORECASTS (2000 prices)

PER CAPITA EXPENDITURE IN	2000					
	(£)					
Convenience Goods	1,450					
Comparison Goods	2,173					
GROWTH IN PER CAPITA RETAIL EXPENDITURE:						
Convenience Goods:	0.10	% pa 2000-31				
Comparison Goods:	13.70	% 2000-02		3.6	%pa 2002-31	
PER CAPITA EXPENDITURE IN	2003	2006	2011	2016	2031	
Convenience Goods: (£)	1,454.35	1,458.72	1,466.03	1,473.37	1,495.63	
Comparison Goods (£):	2,559.65	2,846.16	3,396.71	4,053.75	6,890.54	

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	81,864	89,501	107,642	127,313	196,469	144,080	174,629	249,400	350,280	905,156
2	35,859	36,223	36,777	37,287	39,027	63,111	70,676	85,210	102,588	179,800
3	105,474	106,546	108,164	109,663	114,767	185,634	207,886	250,609	301,720	528,744
4	29,778	30,082	30,537	30,961	32,404	52,409	58,693	70,753	85,185	149,288
5	27,871	28,153	28,582	28,980	30,329	49,053	54,931	66,222	79,733	139,730
6	33,651	34,020	34,603	35,193	37,030	59,225	66,378	80,172	96,828	170,603
7	20,355	20,562	20,875	21,165	22,152	35,824	40,119	48,366	58,232	102,057
TOTALS	334,852	345,088	367,179	390,562	472,178	589,336	673,313	850,732	1,074,568	2,175,377

SOURCES: MapInfo Area Profile Report for Ashford.
The Data Consultancy (URPI) Information Brief 99/2.
Table 1 for population.

NOTES: Expenditure on Special Forms of Trading excluded.

Table 2b
CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS CATEGORIES 2003 (2000 Prices)

	Comparison Goods Categories								
Per Capita Expenditure	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	TOTAL
Expenditure in 2000 including SFT	£ 589.00	£ 216.00	£ 77.00	£ 97.00	£ 180.00	£ 256.00	£ 254.00	£ 683.00	£ 2,352.00
Exclusion for SFT (%)	7.6	7.6	7.6	7.6	7.6	7.6	7.6	7.6	
Expenditure in 2000 excluding SFT	£ 544.24	£ 199.58	£ 71.15	£ 89.63	£ 166.32	£ 236.54	£ 234.70	£ 631.09	£ 2,173.25
	Total Comparison Goods Expenditure by Goods Category								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medica & beauty goods	All other comparison gds	TOTAL
Per capita expenditure 2003:	£ 641.07	£ 235.10	£ 83.81	£ 105.58	£ 195.91	£ 278.63	£ 276.46	£ 743.38	£ 2,559.94
Catchment Zones:	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	36,085	13,234	4,718	5,943	11,028	15,684	15,562	41,844	144,097
2	15,806	5,797	2,066	2,603	4,830	6,870	6,816	18,329	63,118
3	46,492	17,050	6,078	7,657	14,208	20,207	20,050	53,912	185,655
4	13,126	4,814	1,716	2,162	4,011	5,705	5,661	15,221	52,415
5	12,285	4,505	1,606	2,023	3,754	5,340	5,298	14,246	49,058
6	14,833	5,440	1,939	2,443	4,533	6,447	6,397	17,200	59,231
7	8,972	3,290	1,173	1,478	2,742	3,900	3,869	10,404	35,828
TOTAL	147,601	54,130	19,296	24,309	45,107	64,152	63,652	171,157	589,403

SOURCE: MapInfo Area Profile Report for Ashford.
The Data Consultancy (URPI) Information Brief 99/2
Table 1 for population.
Table 2a for growth in expenditure 2000-03.

ASHFORD TOWN CENTRE FORECASTS

Scenario 1 - No change in Ashford town centre's market shares

TABLE 3a

ASHFORD TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline

Market Shares indicated by the Household Interview Survey 2003 remain unchanged throughout forecasting period.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO TOWN CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1	8	8	8	8	8	48	48	48	48	48
2	2	2	2	2	2	39	39	39	39	39
3	2	2	2	2	2	6	6	6	6	6
4	0	0	0	0	0	30	30	30	30	30
5	1	1	1	1	1	30	30	30	30	30
6	0	0	0	0	0	6	6	6	6	6
7	0	0	0	0	0	7	7	7	7	7

SOURCE: Tables 3a(i) and 3a(ii)

TABLE 4a

FORECAST RETAIL SALES IN ASHFORD TOWN CENTRE (2000 prices)

SCENARIO: **As Table 3**

Catchment zone	RETAIL SALES IN ASHFORD TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	6,549	7,160	8,611	10,185	15,718	69,159	83,822	119,712	168,135	434,475
2	717	724	736	746	781	24,613	27,564	33,232	40,009	70,122
3	2,109	2,131	2,163	2,193	2,295	11,138	12,473	15,037	18,103	31,725
4	0	0	0	0	0	15,723	17,608	21,226	25,556	44,786
5	279	282	286	290	303	14,716	16,479	19,867	23,920	41,919
6	0	0	0	0	0	3,553	3,983	4,810	5,810	10,236
7	0	0	0	0	0	2,508	2,808	3,386	4,076	7,144
TOTALS	9,655	10,297	11,796	13,414	19,097	141,410	164,737	217,269	285,609	640,407

SOURCE: Tables 2a & 3a

TABLE 3a (i)
CONVENIENCE GOODS 2003

ALLOCATIONS TO TOWN CENTRE 2003			
	Main Food Q2	Top-up convenience Q4	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100
Zone	(%)	(%)	(%)
1	5.6	14.9	7.9
2	1.3	5.3	2.3
3	2.0	1.6	1.9
4	0.0	0.0	0.0
5	1.0	0.0	0.8
6	0.0	0.0	0.0
7	0.0	1.1	0.3

SOURCE: Ashford Household Interview Survey, Oct 2003.

TABLE 3a (ii)
COMPARISON GOODS 2003

ALLOCATIONS TO ASHFORD TOWN CENTRE INDICATED BY THE HOUSEHOLD INTERVIEW SURVEY 2003								
Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, grdn products Q10	Chemist, medcl & beauty gds Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
641.07	235.1	83.81	105.58	195.91	278.63	276.46	743.38	2559.94
(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
49.2	39.5	54.4	34.9	39.8	16.5	61.5	59.8	48.0
43.2	26.1	36.6	26.3	39.3	20.8	43.6	47.0	39.1
8.5	6.9	5.9	5.0	5.7	2.7	2.6	4.7	5.5
39.3	23.6	33.3	18.7	20.7	16.7	15.8	37.6	29.9
31.2	27.5	26.7	30.3	23.9	20.7	30.9	36.0	30.3
13.2	8.2	10.8	2.2	3.3	1.1	4.1	3.5	6.3
8.5	5.4	10.0	4.3	5.6	0.0	6.0	10.1	7.1

SOURCE: Ashford Household Interview Survey, October 2003.
MapInfo Report for expenditure

TABLE 4a (i)
COMPARISON GOODS SALES IN ASHFORD TOWN CENTRE BY GOODS TYPE 2003 (2000 Prices)

Catchment Zones	EXPENDITURE IN ASHFORD TOWN CENTRE INDICATED BY HOUSEHOLD INTERVIEW SURVEY 2003 (£000)							
	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, grdn products Q10	Chemist, medcl & beauty gds Q11	All other comparison gds Q12
1	17,754	5,227	2,566	2,074	4,389	2,588	9,570	25,023
2	6,828	1,513	756	685	1,898	1,429	2,972	8,615
3	3,952	1,176	359	383	810	546	521	2,534
4	5,158	1,136	571	404	830	953	894	5,723
5	3,833	1,239	429	613	897	1,105	1,637	5,129
6	1,958	446	209	54	150	71	262	602
7	763	178	117	64	154	0	232	1,051
TOTALS	40,246	10,915	5,008	4,276	9,128	6,691	16,090	48,676
MARKET SHARES	27.3%	20.2%	26.0%	17.6%	20.2%	10.4%	25.3%	28.4%

SOURCE: Tables 2b and 3a (ii)

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TABLE 5a

FUTURE SHOP FLOORSPACE CAPACITY TOWN IN ASHFORD TOWN CENTRE

SCENARIO: **As Table 3**										
Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices)										
Convenience Goods:	0.00 % pa 2003-2031					Durable Goods:	1.5 %pa 2003-31			
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003	2006	2011	2016	2031	2003	2006	2011	2016	2031
Residents' Spending £000	9,655	10,297	11,796	13,414	19,097	141,410	164,737	217,269	285,609	640,407
Plus visitors' spending (%)	0	0	0	0	0	7.5	7.5	7.5	7.5	7.5
Total spending (£000)	9,655	10,297	11,796	13,414	19,097	152,015	177,092	233,564	307,029	688,438
Existing shop floorspace (sq m net)	914	914	914	914	914	43,627	43,627	43,627	43,627	43,627
Sales per sq m net £	10,565	7,072	7,072	7,072	7,072	3,484	3,644	3,925	4,229	5,287
Sales from extg flrspce (£000)	9,655	6,463	6,463	6,463	6,463	152,015	158,959	171,244	184,478	230,641
Residual spending to support new shops (£000)	0	3,834	5,333	6,951	12,634	0	18,133	62,320	122,551	457,797
Sales per sq m net in new shops (£)	9,000	9,000	9,000	9,000	9,000	4,000	4,277	4,608	4,964	6,206
Supportable capacity for new shop flrspce (sq m net)	**0**	**426**	**593**	**772**	**1,404**	**0**	**4,240**	**13,525**	**24,689**	**73,768**

SOURCES: Table 4a, Ashford Borough Council, CB Richard Ellis.
CB Richard Ellis' 'National Survey of Local Shopping Patterns 2002' for visitor expenditure.

NOTES: Comparison goods shop floorspace vacant in October 2003 (11,495 sq m gross, estimated as 7,483 sq m net) not included.
Net comparison goods floorspace assumed to be 55% of gross (calculated as GF times number of floors less vacant upper floors). Total GF floorspace in 2003 = 42,214 sq m.

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Table 5a (i)
SALES CAPACITY OF EXISTING TOWN CENTRE
MAIN FOOD AND CONVENIENCE GOODS SHOPS AND STORES IN 2001/2

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)
Marks & Spencer est	500	100.0	500	8,854	4,427
Iceland	465	89.0	414	4,919	2,036
ALL STORES & SHOPS			914	7,072	6,463

SOURCES: Ashford Borough Council, CB Richard Ellis, Verdict Research

ASHFORD TOWN CENTRE FORECASTS

Scenario 2 - Market shares rise due to new development

TABLE 3a

ASHFORD TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 2. Growth of Ashford town centre.
Increase in Town Centre attraction for comparison goods from 2006 due to proposed new town centre retail development.
No change in market shares for convenience goods.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO TOWN CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1	8	8	8	8	8	48	54	54	54	54
2	2	2	2	2	2	39	44	44	44	44
3	2	2	2	2	2	6	7	7	7	7
4	0	0	0	0	0	30	33	33	33	33
5	1	1	1	1	1	30	33	33	33	33
6	0	0	0	0	0	6	7	7	7	7
7	0	0	0	0	0	7	8	8	8	8

SOURCE: Tables 3a(i) and 3a(ii), with adjustments from 2011 onwards.

TABLE 4a

FORECAST RETAIL SALES IN ASHFORD TOWN CENTRE (2000 prices)

SCENARIO: **As Table 3**

Catchment zone	RETAIL SALES IN ASHFORD TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	6,549	7,160	8,611	10,185	15,718	69,159	94,300	134,676	189,151	488,784
2	717	724	736	746	781	24,613	31,097	37,492	45,139	79,112
3	2,109	2,131	2,163	2,193	2,295	11,138	14,552	17,543	21,120	37,012
4	0	0	0	0	0	15,723	19,369	23,349	28,111	49,265
5	279	282	286	290	303	14,716	18,127	21,853	26,312	46,111
6	0	0	0	0	0	3,553	4,646	5,612	6,778	11,942
7	0	0	0	0	0	2,508	3,210	3,869	4,659	8,165
TOTALS	9,655	10,297	11,796	13,414	19,097	141,410	185,301	244,394	321,270	720,391

SOURCE: Tables 2a & 3a

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ASHFORD TOWN CENTRE FORECASTS

Scenario 2 - Market shares rise due to new development

TABLE 3a

ASHFORD TOWN CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 2. Growth of Ashford town centre.
Increase in Town Centre attraction for comparison goods from 2006 due to proposed new town centre retail development.
No change in market shares for convenience goods.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO TOWN CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1	8	8	8	8	8	48	54	54	54	54
2	2	2	2	2	2	39	44	44	44	44
3	2	2	2	2	2	6	7	7	7	7
4	0	0	0	0	0	30	33	33	33	33
5	1	1	1	1	1	30	33	33	33	33
6	0	0	0	0	0	6	7	7	7	7
7	0	0	0	0	0	7	8	8	8	8

SOURCE: Tables 3a(i) and 3a(ii), with adjustments from 2011 onwards.

TABLE 4a

FORECAST RETAIL SALES IN ASHFORD TOWN CENTRE (2000 prices)

SCENARIO: **As Table 3**

Catchment zone	RETAIL SALES IN ASHFORD TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	6,549	7,160	8,611	10,185	15,718	69,159	94,300	134,676	189,151	488,784
2	717	724	736	746	781	24,613	31,097	37,492	45,139	79,112
3	2,109	2,131	2,163	2,193	2,295	11,138	14,552	17,543	21,120	37,012
4	0	0	0	0	0	15,723	19,369	23,349	28,111	49,265
5	279	282	286	290	303	14,716	18,127	21,853	26,312	46,111
6	0	0	0	0	0	3,553	4,646	5,612	6,778	11,942
7	0	0	0	0	0	2,508	3,210	3,869	4,659	8,165
TOTALS	9,655	10,297	11,796	13,414	19,097	141,410	185,301	244,394	321,270	720,391

SOURCE: Tables 2a & 3a

TABLE 5a

FUTURE SHOP FLOORSPACE CAPACITY TOWN IN ASHFORD TOWN CENTRE

SCENARIO: **As Table 3**

Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices)
Convenience Goods: 0.00 % pa 2003-2011 — Durable Goods: 1.5 %pa 2003-11

	CONVENIENCE GOODS					ALL COMPARISON GOODS				
	2003	2006	2011	2016	2031	2003	2006	2011	2016	2031
Residents' Spending £000	9,655	10,297	11,796	13,414	19,097	141,410	185,301	244,394	321,270	720,391
Plus visitors' spending (%)	0	0	0	0	0	7.5	8	8	8	8
Total spending (£000)	9,655	10,297	11,796	13,414	19,097	152,015	200,125	263,946	346,972	778,022
Existing shop floorspace (sq m net)	914	914	914	914	914	43,627	43,627	43,627	43,627	43,627
Sales per sq m net £	10,565	7,072	7,072	7,072	7,072	3,484	3,644	3,925	4,229	5,287
Sales from extg flrspce (£000)	9,655	6,463	6,463	6,463	6,463	152,015	158,959	171,244	184,478	230,641
Residual spending to support new shops (£000)	0	3,834	5,333	6,951	12,634	0	41,166	92,702	162,493	547,381
Sales per sq m net in new shops (£)	9,000	9,000	9,000	9,000	9,000	4,000	4,277	4,608	4,964	6,206
Supportable capacity for new shop flrspce (sq m net)	**0**	**426**	**593**	**772**	**1,404**	**0**	**9,625**	**20,119**	**32,736**	**88,204**

SOURCES: Table 4a, Ashford Borough Council, CB Richard Ellis.
CB Richard Ellis' 'National Survey of Local Shopping Patterns 2002' for visitor expenditure.

NOTES: Comparison goods shop floorspace vacant in October 2003 (11,495 sq m gross, estimated as 7,483 sq m net) not included.
Net comparison goods floorspace assumed to be 55% of gross (calculated as GF times number of floors less vacant upper floors). Total GF floorspace in 2003 = 42,214 sq m.

ASHFORD OUT-OF-CENTRE FORECASTS

Scenario 1 - No change in Ashford out-of-centre market shares

TABLE 3b

NON CITY CENTRE STORES' DRAW FROM THE CATCHMENT AREA

SCENARIO: 1 - Baseline

Market Shares indicated by the Household Interview Survey 2003 remain unchanged throughout forecasting period.

Catchment Zone	PROPORTIONS OF EXPENDITURE IN MAJOR NON-CENTRAL FOOD STORES AND RETAIL WAREHOUSES									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1	85	85	85	85	85	22	22	22	22	22
2	71	71	71	71	71	19	19	19	19	19
3	7	7	7	7	7	4	4	4	4	4
4	34	34	34	34	34	17	17	17	17	17
5	56	56	56	56	56	14	14	14	14	14
6	16	16	16	16	16	4	4	4	4	4
7	20	20	20	20	20	3	3	3	3	3

SOURCE: Based on Tables 3b(i) and (ii).

TABLE 4b

FORECAST RETAIL SALES IN NON-CENTRAL STORES (2000 prices)

SCENARIO: **As Table 3b**

Catchment Zone	SALES IN MAJOR FOOD STORES AND NON-CENTRAL RETAIL WAREHOUSES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	69,585	76,076	91,496	108,216	166,999	31,698	38,418	54,868	77,062	199,134
2	25,460	25,718	26,112	26,474	27,709	11,991	13,428	16,190	19,492	34,162
3	7,383	7,458	7,571	7,676	8,034	7,425	8,315	10,024	12,069	21,150
4	10,124	10,228	10,383	10,527	11,017	8,909	9,978	12,028	14,482	25,379
5	15,608	15,766	16,006	16,229	16,984	6,867	7,690	9,271	11,163	19,562
6	5,384	5,443	5,536	5,631	5,925	2,369	2,655	3,207	3,873	6,824
7	4,071	4,112	4,175	4,233	4,430	1,075	1,204	1,451	1,747	3,062
TOTALS	137,615	144,802	161,278	178,985	241,098	70,335	81,689	107,039	139,886	309,273

SOURCE: Tables 2 & 3b

CB RICHARD ELLIS

TABLE 3b (i)
CONVENIENCE GOODS 2000

ALLOCATIONS TO MAJOR FOOD STORES			
	Main Food Q2	Top-up convenience Q5	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100
Zone	(%)	(%)	(%)
1	91.2	65.8	84.9
2	82.8	37.1	71.4
3	7.0	6.6	6.9
4	40.0	14.0	33.5
5	67.0	24.1	56.3
6	19.0	7.0	16.0
7	25.0	4.5	19.9

TABLE 3b (ii)
ALL COMPARISON GOODS 2003

ALLOCATIONS TO RETAIL WAREHOUSES IN ASHFORD INDICATED BY THE HOUSEHOLD INTERVIEW SURVEY 2003								
Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, grdn products Q10	Chemist, medcl & beauty gds Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
£ 641.07	£ 235.10	£ 83.81	£ 105.58	£ 195.91	£ 278.63	£ 276.46	£ 743.38	2559.94
(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
2.9	28.2	9.7	55.7	46.9	76.8	23.9	6.1	22.2
0.7	21.6	15.4	48.1	35.6	68.8	19.5	6.1	18.7
3.2	7.5	5.3	8.9	7.5	10.2	1.0	1.2	4.2
4.5	28.1	7.1	41.8	41.4	51.0	4.2	8.2	17.2
4.3	22.5	8.0	32.6	33.0	50.0	3.1	2.3	13.7
0.0	4.7	2.4	6.5	4.4	13.8	2.1	3.5	3.9
0.0	3.3	1.1	8.5	6.7	12.8	2.0	0.0	2.8

SOURCES: Ashford Household Interview Survey, October 2003.
MapInfo Report for expenditure

TABLE 4b (i)
COMPARISON GOODS SALES IN ASHFORD RETAIL WAREHOUSES BY GOODS TYPE 2003 (2000 Prices)

Catchment Zones	EXPENDITURE IN RETAIL WAREHOUSES INDICATED BY HOUSEHOLD INTERVIEW SURVEY 2003 (£000)							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, grdn products (£000)	Chemist, medcl & beauty gds (£000)	All other comparison gds (£000)
1	1,046	3,732	458	3,310	5,172	12,045	3,719	2,553
2	111	1,252	318	1,252	1,720	4,727	1,329	1,118
3	1,488	1,279	322	681	1,066	2,061	200	647
4	591	1,353	122	904	1,661	2,910	238	1,248
5	528	1,014	128	660	1,239	2,670	164	328
6	0	256	47	159	199	890	134	602
7	0	109	13	126	184	499	77	0
TOTALS	3,764	8,993	1,408	7,091	11,240	25,801	5,863	6,495
MARKET SHARES	2.5%	16.6%	7.3%	29.2%	24.9%	40.2%	9.2%	3.8%

SOURCE: Tables 2b and 3b (ii)

CB RICHARD ELLIS

TABLE 5b

FORECAST FOOD STORE AND RETAIL WAREHOUSE FLOORSPACE CAPACITY

SCENARIO: **As Table 3b**

Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices):

Convenience Goods: Durable Goods: 1.0 % pa 2003-2031

	CONVENIENCE GOODS 2003	2006	2011	2016	2031	COMPARISON GOODS 2003	2006	2011	2016	2031
Residents' Spending £000	137,615	144,802	161,278	178,985	241,098	70,335	81,689	107,039	139,886	309,273
Existing shop floorspace (sq m net)	10,405	10,405	10,405	10,405	10,405	31,480	37,363	37,363	37,363	37,363
Sales per sq m net £	13,225	10,646	10,646	10,646	10,646	2,234	3,098	3,256	3,422	3,973
Sales from extg flrspce (£000)	137,615	110,772	110,772	110,772	110,772	70,335	115,740	121,644	127,849	148,429
Residual spending to support new shops (£000)	0	34,030	50,506	68,213	130,326	0	(34,051)	(14,605)	12,038	160,844
Sales per sq m net in new shops (£)	0	10,000	10,000	10,000	10,000	2,750	3,000	3,250	3,500	4,000
Supportable capacity for new shop flrspce (sq m net)	0	3,403	5,051	6,821	13,033	0	(11,350)	(4,494)	3,439	40,211
Less policy commitments (sq m net)	0	0	0	0	0	0	0	0	0	0
Capacity for new floorspace (sq m net)	**0**	**3,403**	**5,051**	**6,821**	**13,033**	**0**	**(11,350)**	**(4,494)**	**3,439**	**40,211**

SOURCES: Tables 4b, 5b(I) & 5b (ii); Ashford Borough Council; CB Richard Ellis.

NOTES:

Table 5b(i)

SALES CAPACITY OF EXISTING NON-CITY CENTRE MAJOR FOOD STORES

As at 2003, including store extensions and new Lidl store developed since 2000.

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	3,530	56	1,977	12,021	23,763
Farm Foods	312	95	296	5,000	1,482
Lidl	819	78	639	5,443	3,477
Sainsbury	4,268	79	3,372	9,552	32,207
Tesco (Kingsnorth)	2,487	65	1,617	12,093	19,549
Tesco (Willesborough)	3,854	65	2505.1	12093	30,294
ALL STORES & SHOPS (As at 2030)	15,270		10,405	10,646	110,772

SOURCE: IGD; Ashford Borough Council; CB Richard Ellis estimates based on Verdict Research.

Table 5b (ii)

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES

Applying 2000/1 sales densities (2000 Prices) 2000

Stores existing in October 2003	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density per sq m net)	Sales 2000/1 (£000)
Ashford Retail Park, Sevington:				
Wickes	2,493	2,119	2,605	5,520
Allied Crpts/Carringtns/PSimon	1,800	1,530	1,500	2,295
Comet	793	674	6,450	4,348
Homebase	3,088	2,625	1,341	3,520
Warren Retail Park:				
Harveys	1,036	881	1,520	1,339
Halfords (2)	300	255	2,049	522
Carpetright	720	612	1,315	805
Currys	1,021	868	5,236	4,544
Staples (3)	4,128	3,509	1,527	5,358
MFI	1,296	1,102	1,771	1,951
New Street Retail Park:				
Tiles R Us/Hot Spot	1,041	885	3,000	2,655
Choices Video	337	286	1,644	471
Other Retail Warehouses:				
Matalan	2,696	2,292	3,111	7,129
B&Q (3)	7703	6,548	1,575	10,312
Homeplus Superstore	2,290	1,947	2,000	3,893
Tile Magic	800	680	1250	850
Durable Goods Floorspace in Food Superstores:				
Asda		1,553	6,424	9,978
Sainsbury		896	8,180	7,332
Tesco (Kingsnorth)		870	7,135	6,211
Tesco (Willesborough)		1,349	7,135	9,624
TOTALS at October 2003		**31,480**	**2,816**	**88,656**
Ashford Retail Park New Development (stores opened after H/h interview survey):				
Unit 1, TKMaxx	1,858	1,579	1,834	2,896
Unit 2, Not yet built	1,022	869	2,500	2,172
Unit 3, Not yet built	697	592	2,500	1,481
Unit 4, Not yet built	929	790	2,500	1,974
Unit 5, PC World (3)	1,394	1,185	6,521	7,727
Unit 6, Argos (4)	1,022	869	4,750	4,126
TOTALS new development		**5,884**	**3,463**	**20,376**
TOTALS Existing and new		**37,363**	**2,918**	**109,032**

SOURCE Retail Rankings 2002 adjusted for VAT for compatibility with expenditure figu and CB Richard Ellis estimates.

NOTES:
(1) Floorspace estimated by CB Richard Ellis.
(2) Estimated sales area for cycles and cycle accessories (ie retail sales).
(3) Sales density reduced by 25% to allow for trade sales.
(4) CB Richard Ellis estimate of sales based on average sales per outlet.

ASHFORD OUT-OF-CENTRE FORECASTS

Scenario 2 - Market shares fall due to new town centre development

TABLE 3b

NON TOWN CENTRE STORES' DRAW FROM THE CATCHMENT AREA

SCENARIO: 2. Growth of Ashford town centre.
Reduction in out of centre comparison goods market shares due to new development in Ashford Town Centre.
No change in market shares for convenience goods.

Catchment Zone	PROPORTIONS OF EXPENDITURE IN MAJOR NON-CENTRAL FOOD STORES AND RETAIL WAREHOUSES									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1	85	85	85	85	85	22	21	21	21	21
2	71	71	71	71	71	19	18	18	18	18
3	7	7	7	7	7	4	4	4	4	4
4	34	34	34	34	34	17	16	16	16	16
5	56	56	56	56	56	14	14	14	14	14
6	16	16	16	16	16	4	4	4	4	4
7	20	20	20	20	20	3	3	3	3	3

SOURCE: Based on Tables 3b(i) and (ii) with adjustments in 2006 and 2011.

TABLE 4b

FORECAST RETAIL SALES IN NON-CENTRAL STORES (2000 prices)

SCENARIO: **As Table 3b**

Catchment Zone	PROPORTIONS OF EXPENDITURE IN MAJOR NON-CENTRAL FOOD STORES AND RETAIL WAREHOUSES									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1	69,585	76,076	91,496	108,216	166,999	31,698	36,672	52,374	73,559	190,083
2	25,460	25,718	26,112	26,474	27,709	11,991	12,722	15,338	18,466	32,364
3	7,383	7,458	7,571	7,676	8,034	7,425	8,315	10,024	12,069	21,150
4	10,124	10,228	10,383	10,527	11,017	8,909	9,391	11,321	13,630	23,886
5	15,608	15,766	16,006	16,229	16,984	6,867	7,690	9,271	11,163	19,562
6	5,384	5,443	5,536	5,631	5,925	2,369	2,655	3,207	3,873	6,824
7	4,071	4,112	4,175	4,233	4,430	1,075	1,204	1,451	1,747	3,062
TOTALS	137,615	144,802	161,278	178,985	241,098	70,335	78,649	102,986	134,506	296,931

SOURCE: Tables 2 & 3b

TABLE 5b

FORECAST FOOD STORE AND RETAIL WAREHOUSE FLOORSPACE CAPACITY

SCENARIO: **As Table 3b**

Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices):

Convenience Goods: Durable Goods: 1.0 % pa 2003-2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2003	2006	2011	2016	2031	2003	2006	2011	2016	2031
Residents' Spending £000	137,615	144,802	161,278	178,985	241,098	70,335	78,649	102,986	134,506	296,931
Existing shop floorspace (sq m net)	10,405	10,405	10,405	10,405	10,405	31,480	37,363	37,363	37,363	37,363
Sales per sq m net £	13,225	10,646	10,646	10,646	10,646	2,234	3,098	3,256	3,422	3,973
Sales from extg flrspce (£000)	137,615	110,772	110,772	110,772	110,772	70,335	115,740	121,644	127,849	148,429
Residual spending to support new shops (£000)	0	34,030	50,506	68,213	130,326	0	(37,091)	(18,658)	6,657	148,502
Sales per sq m net in new shops (£)	0	10,000	10,000	10,000	10,000	2,750	3,100	3,250	3,400	4,000
Supportable capacity for new shop flrspce (sq m net)	0	3,403	5,051	6,821	13,033	0	(11,965)	(5,741)	1,958	37,126
Less policy commitments (sq m net)	0	0	0	0	0	0	0	0	0	0
Capacity for new floorspace (sq m net)	**0**	**3,403**	**5,051**	**6,821**	**13,033**	**0**	**(11,965)**	**(5,741)**	**1,958**	**37,126**

SOURCES: Table 4b, Ashford Borough Council, CB Richard Ellis.

NOTES:

ASHFORD DESIGNER OUTLET CENTRE FORECASTS

Scenario 1 - No change in Designer Outlet Centre's market shares

TABLE 3c

ASHFORD DESIGNER OUTLET CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline

Market Shares indicated by the Household Interview Survey 2003 remain unchanged throughout the forecasting period.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO DESIGNER OUTLET CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1						8	8	8	8	8
2						4	4	4	4	4
3						3	3	3	3	3
4						5	5	5	5	5
5						5	5	5	5	5
6						2	2	2	2	2
7						1	1	1	1	1

SOURCE: Table 3c(ii)

TABLE 4c

FORECAST RETAIL SALES IN ASHFORD DESIGNER OUTLET CENTRE (2000 prices)

SCENARIO: **As Table 3**

Catchment zone	RETAIL SALES IN ASHFORD DESIGNER OUTLET CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1						11,526	13,970	19,952	28,022	72,412
2						2,524	2,827	3,408	4,104	7,192
3						5,569	6,237	7,518	9,052	15,862
4						2,620	2,935	3,538	4,259	7,464
5						2,453	2,747	3,311	3,987	6,986
6						1,184	1,328	1,603	1,937	3,412
7						358	401	484	582	1,021
TOTALS						26,236	30,444	39,815	51,942	114,350

SOURCE: Tables 2a & 3c

TABLE 3c (ii)
COMPARISON GOODS 2003

Catchment Zones	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, grdn products Q10	Chemist, medcl & beauty gds Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
	ALLOCATIONS TO ASHFORD DESIGNER OUTLET CENTRE INDICATED BY THE HOUSEHOLD INTERVIEW SURVEY 2003								
Expenditure Weighting:	641.07	235.1	83.81	105.58	195.91	278.63	276.46	743.38	2559.94
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	11.3	2.7	7.5	1.7	0.9	1.3	1.6	13.1	7.6
2	7.5	0.0	4.9	1.5	1.5	0.0	0.7	6.8	4.3
3	7.9	0.6	0.6	0.0	0.0	0.5	0.0	1.7	2.6
4	10.1	0.0	2.4	1.1	1.1	1.0	2.1	7.1	5.1
5	14.0	2.5	5.3	1.1	3.4	0.0	3.1	1.2	4.9
6	5.5	0.0	3.6	1.1	0.0	1.1	1.0	2.3	2.4
7	2.1	0.0	2.2	0.0	0.0	0.0	1.0	1.1	1.0

SOURCE: Ashford Household Interview Survey, October 2003.
MapInfo Report for expenditure

TABLE 4c (i)
COMPARISON GOODS SALES IN ASHFORD DESIGNER OUTLET CENTRE BY GOODS TYPE 2003 (2000 Prices)

Catchment Zones	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, grdn products Q10	Chemist, medcl & beauty gds Q11	All other comparison gds Q12
	EXPENDITURE IN ASHFORD DESIGNER OUTLET CENTRE SHOWN BY HOUSEHOLD INTERVIEW SURVEY 2003 (£000)							
1	4,078	357	354	101	99	204	249	5,482
2	1,185	0	101	39	72	0	48	1,246
3	3,673	102	36	0	0	101	0	917
4	1,326	0	41	24	44	57	119	1,081
5	1,720	113	85	22	128	0	164	171
6	816	0	70	27	0	71	64	396
7	188	0	26	0	0	0	39	114
TOTALS	12,986	572	713	213	343	433	682	9,406
MARKET SHARES	8.8%	1.1%	3.7%	0.9%	0.8%	0.7%	1.1%	5.5%

SOURCE: Tables 2b and 3c (ii)

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TABLE 5c

FUTURE SHOP FLOORSPACE CAPACITY IN ASHFORD DESIGNER OUTLET CENTRE

SCENARIO: **As Table 3**

Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices)

Convenience Goods: 0.00 % pa 2003-2031 | Durable Goods: 1.5 %pa 2003-31

	CONVENIENCE GOODS					COMPARISON GOODS				
	2003	2006	2011	2016	2031	2003	2006	2011	2016	2031
Residents' Spending £000						26,236	30,444	39,815	51,942	114,350
Plus visitors' spending (%)						20	20	20	20	20
Total spending (£000)						31,483	36,533	47,777	62,331	137,220
Existing shop floorspace (sq m net)						12,504	12,504	12,504	12,504	12,504
Sales per sq m net £						2,518	2,633	2,836	3,056	3,820
Sales from extg flrspce (£000)						31,483	32,921	35,465	38,206	47,766
Residual spending to support new shops (£000)						0	3,612	12,312	24,125	89,454
Sales per sq m net in new shops (£)						3,500	3,660	3,943	4,247	5,310
Supportable capacity for new shop flrspce (sq m net)						**0**	**987**	**3,123**	**5,680**	**16,845**

SOURCES: Table 4c, Ashford Borough Council, CB Richard Ellis.

NOTES: Gross floorspace of 18,524 sq m, less assumed 10% for convenience goods and A3 uses, at assumed net to gross ratio of 75%, equals durable goods floorspace of 12,504 sq m net.

ASHFORD DESIGNER OUTLET CENTRE FORECASTS

Scenario 2 - Market shares rise due to new development

TABLE 3c

ASHFORD DESIGNER OUTLET CENTRE'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 2. Growth of Ashford town centre.
Reduction in Designer Outlet Centre attraction from 2006 due to proposed new town centre retail development.

Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO DESIGNER OUTLET CENTRE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)	2003 (%)	2006 (%)	2011 (%)	2016 (%)	2031 (%)
1						8	6	6	6	6
2						4	3	3	3	3
3						3	3	3	3	3
4						5	4	4	4	4
5						5	4	4	4	4
6						2	2	2	2	2
7						1	1	1	1	1

SOURCE: Table 3c(ii), with adjustments from 2011 onwards.

TABLE 4c

FORECAST RETAIL SALES IN ASHFORD DESIGNER OUTLET CENTRE (2000 prices)

SCENARIO: **As Table 3**

Catchment zone	RETAIL SALES IN ASHFORD DESIGNER OUTLET CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)	2003 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2031 (£000)
1						11,526	10,478	14,964	21,017	54,309
2						2,524	2,120	2,556	3,078	5,394
3						5,569	6,237	7,518	9,052	15,862
4						2,620	2,348	2,830	3,407	5,972
5						2,453	2,197	2,649	3,189	5,589
6						1,184	1,328	1,603	1,937	3,412
7						358	401	484	582	1,021
TOTALS						26,236	25,108	32,605	42,262	91,559

SOURCE: Tables 2a & 3c

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TABLE 5c

FUTURE SHOP FLOORSPACE CAPACITY IN ASHFORD DESIGNER OUTLET CENTRE

SCENARIO: **As Table 3**

Growth in sales per sq m from shop floorspace existing in 2003 (at 2000 prices)
Convenience Goods: 0.00 % pa 2003-2011 Durable Goods: 1.5 %pa 2003-11

	CONVENIENCE GOODS 2003	2006	2011	2016	2031	ALL COMPARISON GOODS 2003	2006	2011	2016	2031
Residents' Spending £000						26,236	25,108	32,605	42,262	91,559
Plus visitors' spending (%)						20	20	20	20	20
Total spending (£000)						31,483	30,130	39,126	50,714	109,871
Existing shop floorspace (sq m net)						12,504	12,504	12,504	12,504	12,504
Sales per sq m net £						2,518	2,633	2,836	3,056	3,820
Sales from extg flrspce (£000)						31,483	32,921	35,465	38,206	47,766
Residual spending to support new shops (£000)						0	(2,791)	3,660	12,508	62,104
Sales per sq m net in new shops (£)						3,500	3,660	3,943	4,247	5,310
Supportable capacity for new shop flrspce (sq m net)						**0**	**(763)**	**928**	**2,945**	**11,695**

SOURCES: Table 4c, Ashford Borough Council, CB Richard Ellis.

NOTES:

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TABLE 6

MARKET SHARES BY COMPARISON GOODS TYPE 2003

Location	Clothing & footwear Q5 (%)	Furniture/ florcvrgs etc Q6 (%)	Household Textiles Q7 (%)	Household Appliances Q8 (%)	Audio-visual equipment Q9 (%)	ardware, DIY, grdn products Q10 (%)	hemist, medcl & beauty gds Q11 (%)	All other comparison gds Q12 (%)
Town Centre	27.3%	20.2%	26.0%	17.6%	20.2%	10.4%	25.3%	28.4%
Designer Outlet Centre	8.8%	1.1%	3.7%	0.9%	0.8%	0.7%	1.1%	5.5%
Out of Centre	2.5%	16.6%	7.3%	29.2%	24.9%	40.2%	9.2%	3.8%
TOTALS	**38.6%**	**37.8%**	**36.9%**	**47.6%**	**45.9%**	**51.3%**	**35.6%**	**37.7%**

SOURCE: Tables 4a (i), 4b (i) and 4c (i).