

# **Chichester Retail and Main Town Centre Uses Study Update Report**

Chichester District Council

23 March 2022

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## 1.0 Introduction

### Purpose of the report

1.1 Lichfields was commissioned by Chichester District Council to prepare the Chichester Retail and Main Town Centre Uses Study (RMTCUS 2018). The RMTCUS 2018 was partially updated in November 2020 (the 2020 update). The key objective of the RMTCUS 2018 and 2020 update were to provide a robust and credible evidence base to inform the emerging Local Plan Review. These studies provided a quantitative and qualitative assessment of the need for new retail and main town centre uses within Chichester District over the plan period.

1.2 This 2022 report provides a further update of the study. It supersedes the 2020 update and should be read alongside the RMTCUS 2018. This update report replaces the following sections of the RMTCUS 2018:

- Section 3.0: Current provision and trends (paragraphs 3.5 to 3.17);
- Section 4.0: The need for retail uses (paragraphs 4.1 to 4.32 and 4.45 to 4.53);
- Section 5.0: The need for food/beverage uses (paragraphs 5.12 to 5.17);
- Section 6.0: The need for other main town centre uses (6.4 to 6.41 and 6.45);
- Section 9.0: Planning policy analysis (paragraphs 9.1 to 9.48);
- Section 10.0: Accommodating growth (paragraphs 10.3 to 10.22);
- Section 11.0: Conclusions and recommendations (paragraphs 11.1 to 11.23);
- Appendix 2 - Convenience goods capacity;
- Appendix 3 - Comparison goods capacity; and
- Appendix 4 - Food/beverage capacity.

1.3 Previously main town centre uses, as defined by the NPPF, fell into to a range of different use classes e.g. A1 retail, A3/A4/A5 food/beverage, some D2 leisure uses and B1 offices. Evidence based studies have historically provided floorspace projections within these use class categories.

1.4 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

1.5 The UCO changes combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as ‘main town centre uses’ within the NPPF e.g., medical services and some light industrial uses.

1.6 This study update only provides floorspace projections for selected activities now within Class E, but it does not quantify the need for office floorspace. The creation of Class E has blurred the lines. Evidence base studies and policy need to reflect this change, but it would be inappropriate to provide a global floorspace projections for all Class E uses combined. For example, the need for office floorspace should be determined separately within the employment land review evidence, which is not linked with retail or leisure needs. An assessment of the need for sub-

categories within Class E will be required, in the same way the need for comparison and convenience goods retail has historically been quantified separately despite being in the same A1 use class. Future policy should refer to activities within Class E.

- 1.7 The floorspace capacity projections in this report relate to convenience and comparison goods retail (previously A1) and restaurant/café use now in Class E and Sui Generis uses i.e., pubs/bar (previously A4) and takeaways (A5). Need projections with future development plans can continue to refer to separate floorspace projections for convenience and comparison goods retail and food/beverage uses.

### **Report structure**

- 1.8 Section 2 of this report provides an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.
- 1.9 Section 3 updates the need assessment for other main town centre uses.
- 1.10 Section 4 re-examines the options for accommodating the identified floorspace capacity.
- 1.11 Section 5 reviews potential policy options for the emerging Local Plan Review taking account of updated floorspace capacity projections and changes to the Use Classes Order (UCO) and permitted development rights (PDR) since 2018.

## 2.0 Updated floorspace capacity assessment

### Introduction

2.1 This section updates the quantitative assessment of the scope for new retail and food/beverage floorspace in the District during the Local Plan Review period up to 2039. The updated projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential longer-term implications of the Covid-19 crisis.

### Implications of Brexit, Covid-19 and other trends

2.2 As indicated in the RMTCUS 2018, historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

2.3 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021, 2022 and 2023) for retail and leisure were published in January 2022 and now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure during 2020 and 2021; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.5 In the short term, high street operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short-term supply chain disruption has led to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery have benefitted at least in the short term. There is likely to be a longer terms structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.6 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g., most recently Wilko.

2.7 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period with interval projections (i.e., 2022

base year to 2026, 2026 to 2031, 2031 to 2035, and 2035 to 2039), development plan policy should assume population projections will return to projected levels by 2026. The first interval population projections in 2026, and certainly later years, should not be significantly affected by the Covid-19 crisis.

- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes (including on-line sales) during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The latest seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.13 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

### **Long-term expenditure trends**

- 2.14 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.



- 2.15 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Chichester District is likely to relate to population growth or qualitative areas of deficiency.
- 2.16 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.17 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:
- "After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."*
- 2.18 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

### **Demand for town centre floorspace**

- 2.19 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping.
- 2.20 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the Covid-19 pandemic, at least in the short-term.
- 2.21 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

### **Study area and end year**

- 2.22 As in the RMTCUS 2018, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the District. The study area is sub-divided into seven zones as shown in Appendix 1.

2.23 The RMTCUS 2018 provided projections up to 2021, 2026, 2031 and 2036. The projections in this update report have been rolled forward with new projections for 2026, 2031, 2035 and 2039, therefore the floorspace capacity estimates are not directly comparable.

## Population projections

2.24 Experian's MMG3 population projections have been adopted as shown in Table 1 (Appendix 1). The RMTCUS 2018 adopted Chichester District's Objectively Assessed Need (OAN) based population projections and ONS 2014 based sub-national population projection (SNPP 2014) for surrounding authorities. These projections suggested the study area population would increase by +14.9% between 2016 and 2036. Experian's MMG3 projections now suggest +13.4% growth between 2016 to 2036. The ONS's latest figures (SNPP 2018) also suggest lower growth (+12%) during this period.

2.25 Experian's data suggests population within the study area is projected to increase by 13% between 2019 to 2039, increasing from 405,994 in 2019 to 458,640 in 2039. Chichester Council's Housing Economic Development Needs Assessment (HEDNA) includes two scenarios based on an average of 555 dwelling per annum and 634 dwellings per annum in the District (excluding the National Park area). These scenarios suggest population will increase from 90,584 in 2021 to 105,304 in 2038 (baseline growth) or 108,539 in 2038 (high growth).

2.26 This update adopts the HEDNA's expected change in population assuming 555 dwellings per annum (532 dwellings in the southern area of the District) added to the base year population in study area Zones 1, 2 and 3, as the baseline. For Zones 4, 5, 6 and 7, Experian's population projections have been adopted. As a sensitivity analysis, the higher HEDNA population projections for 634 dwellings per annum have been tested.

2.27 Table 1A in Appendix 1 sets out the updated baseline growth population projections to 2039 and Table 1B sets out the high growth projections.

## Expenditure forecasts

2.28 All monetary values expressed in this update report are at 2020 prices, consistent with Experian's latest expenditure information. The RMTCUS 2018 adopted a 2016 price base and therefore the figures are not directly comparable.

2.29 Experian's latest local expenditure figures for the Chichester study area in 2020. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:

- convenience goods: -5.5%;
- comparison goods: +7.0%;
- leisure: +52.8%.

2.30 Experian's short term forecasts, particularly for comparison goods and leisure, assume a post-Covid lockdowns recovery during 2021 and 2022. Experian's medium and long term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for during 2024 and beyond;
- comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
- leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.

2.31 These growth figures relate to real growth and exclude inflation.

- 2.32 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2020 were:
- 5.4% of convenience goods expenditure; and
  - 25.6% of comparison goods expenditure.
- 2.33 Experian's projections suggest that these SFT percentages will increase to 7% and 28% by 2029 respectively. The long term Experian projections suggest an increase to 7.7% and 30.1% by 2039 respectively.
- 2.34 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2039, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.
- 2.35 Allowing for the low population growth scenario, total convenience goods spending within the study area is forecast to increase by +10.3% from £1,084.69 million in 2022 to £1,196.56 million in 2039, as shown in Table 2A (Appendix 2).
- 2.36 The baseline growth scenario suggests comparison goods spending is forecast to increase by +64.7% between 2022 and 2039, increasing from £1,444.50 million in 2022 to £2,379.7 million in 2039, as shown in Table 2A (Appendix 3).
- 2.37 The baseline growth scenario suggests food and beverage spending is forecast to increase by +30.5% between 2022 and 2039, increasing from £612.56 million in 2022 to £799.18 million in 2039, as shown in Table 2A (Appendix 4).

### **Growth in turnover densities**

- 2.38 Experian's Retail Planner Briefing Note 19 - January 2021 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +9.7% during 2022 and 2023, recovering from the impact of the Covid crisis, but lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 2.39 For convenience goods retail, Experian indicates an increase of +4.3% during 2022 and 2023, but lower growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.
- 2.40 Experian does not provide projections for food and beverage sales densities. Significant growth is assumed during 2022 and 2023, in line with expenditure growth. This growth reflects the necessary period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 1% per annum has been adopted after 2023, consistent with the RMTCUS 2018.

### **Base year market shares**

- 2.41 Expenditure patterns in the 2022 base year adopt market shares within each study area zones taken from the RMTCUS 2018. These market shares were calculated from the results of a household shopper survey in 2018. These market shares are assumed to have remained constant up to 2022 and beyond, because there have been no significant changes in retail and

food/beverage provision since the RMTCUS 2018, although the amount of SFT expenditure deducted has increased based on Experian's latest data.

## Capacity for convenience goods retail floorspace

- 2.42 Available convenience goods expenditure attracted to Chichester District has been projected from the 2022 base year forward to 2026, 2031, 2035 and 2039, and is summarised in Table 10A (baseline growth) and 10B (high growth) in Appendix 2. Based on the baseline population growth scenario, convenience goods expenditure available to facilities within the District is expected to increase from £306.45 million in 2022 to £233.62 million in 2039. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). The high growth projection in 2039 is £344.78 million.
- 2.43 The benchmark turnover of the main existing food stores and floorspace has been updated as shown in Table 9A and 9B (Appendix 2). This table adopts the latest ORC food store sales floorspace data and GlobalData's latest company average sales densities. The combined benchmark turnover of existing food stores in the District is £269.52 million. This benchmark turnover excludes small convenience goods shops in the District.
- 2.44 The base year available expenditure figures when compared with the benchmark turnover of the main food stores suggest that convenience goods retail sales floorspace in the District is collectively trading satisfactorily. A breakdown for each main centre is set out in Table 2.1.

Table 2.1 Convenience goods turnover in 2022

Destination	2022 Turnover £m
Chichester	252.03
Selsey	25.61
East Wittering/Bracklesham	12.22
Chichester Rural	16.59
<b>Total</b>	<b>306.45</b>

Source: Table 10A, Appendix 2

- 2.45 Tables 10A and 10B in Appendix 2 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future. Based on the baseline growth scenario, there is a small projected convenience goods expenditure surplus in 2031 in the District. Longer term growth suggests a surplus of +£7.68 million in 2034, increasing to +£17.26 million by 2039. The projected surplus based on the high growth scenario is +£14.37 million in 2035, increasing to +£23.41 million by 2039.
- 2.46 The surplus expenditure projections have been converted into potential new floorspace estimates Tables 11A and 11B in Appendix 2, based on an average sales density of £12,000 per sq.m net in 2022, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The results for the baseline growth scenario are summarised in Table 2.2 overleaf.
- 2.47 Surplus expenditure up to 2039 indicates that there is capacity for additional convenience goods floorspace in the District of 1,959 sq.m gross based on the baseline growth scenario, or 2,658 sq.m gross based on the high growth scenario.

Table 2.2 Convenience goods floorspace capacity (sq.m gross) – baseline growth scenario (cumulative)

Area	2026	2031	2035	2039
Chichester	-692	155	914	1,606
Selsey	-71	15	94	167
East Wittering/Bracklesham	-34	7	45	80
Chichester rural	-46	10	61	107
<b>Total</b>	<b>-844</b>	<b>188</b>	<b>1,113</b>	<b>1,959</b>

Source: Table 11A, Appendix 2

## Capacity for comparison goods floorspace

- 2.48 Available comparison goods expenditure has been projected to 2026, 2031, 2035 and 2039 as summarised in Tables 9A (baseline growth) and 9B (high growth) in Appendix 3. Based on the low population growth scenario, comparison goods expenditure available to facilities within the District is expected to increase from £558.31 million in 2022 to £921.13 million in 2039. The high growth projection by 2039 is £932.9 million.
- 2.49 Tables 10A and 10B in Appendix 3 subtract the turnover of existing floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus expenditure available for new development. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2031 i.e., existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 2.50 By 2035 there is a projected small expenditure surplus of +£13.82 million, increasing to +£38.71 million by 2039. The projected surplus based on the high growth scenario is +£21.68 million in 2035, increasing to +£50.49 million by 2039.
- 2.51 Deficit and surplus comparison expenditure has been converted into comparison goods floorspace projections in Table 10A (baseline growth scenario) in Appendix 3, as summarised in Table 2.3.

Table 2.3 Comparison goods floorspace capacity (sq.m gross) – baseline growth scenario (cumulative)

Area	2026	2031	2035	2039
Chichester	-3,457	-463	1,772	4,470
Selsey	-105	-18	49	130
East Wittering/Bracklesham	-35	-5	18	46
Chichester rural	-15	-3	7	19
<b>Total</b>	<b>-3,613</b>	<b>-488</b>	<b>1,846</b>	<b>4,665</b>

Source: Table 10A, Appendix 3

- 2.52 A comparison goods expenditure deficit is projected up to and beyond 2031, which suggests an over-supply of retail floorspace, resulting in negative floorspace projections. However, the small surplus expenditure by 2035 indicates that there is some capacity for additional comparison goods floorspace in the District of 1,846 sq.m gross. Surplus expenditure up to 2039 indicates that there is capacity for additional comparison goods floorspace in the District of 4,665 sq.m gross adopting the baseline growth scenario, or 6,084 sq.m gross based on the high growth scenario.

## Capacity for food/beverage floorspace

- 2.53 Available food and beverage expenditure has also been projected forward to 2026, 2031, 2035 and 2039, and is summarised in Tables 9A and 9B in Appendix 4. Based on the baseline growth scenario, the amount of expenditure attracted to the District is expected to increase from £221.05 million in 2022 to £288.88 million in 2039. The high growth projection by 2039 is £293.28 million.
- 2.54 Tables 10A and 10B in Appendix 4 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. The baseline growth scenario suggest a small expenditure surplus of +£7.22 million in 2026. Continued population and expenditure growth creates a higher surplus of +£15.42 million at 2031 increasing to +£21.20 million at 2035 and +£27.08 million by 2039. The projected surplus based on the high growth scenario is +£24.36 million in 2035, increasing to +£31.48 million by 2039.
- 2.55 Surplus expenditure has been converted into food/beverage floorspace projections in Table 10A (baseline growth scenario) in Appendix 4, as summarised in Table 2.4 below.

Table 2.4 Food and beverage floorspace capacity (sq.m gross) – baseline growth scenario (cumulative)

Area	2026	2031	2035	2039
Chichester	1,130	2,293	3,026	3,710
Selsey	96	197	262	324
East Wittering/Bracklesham	47	97	130	160
Chichester rural	88	178	236	289
<b>Total</b>	<b>1,361</b>	<b>2,765</b>	<b>3,653</b>	<b>4,483</b>

Source: Table 10A, Appendix 4

- 2.56 Surplus expenditure up to 2039 indicates that there is capacity for additional food/beverage floorspace in the District of 4,483 sq.m gross, adopting the baseline growth scenario, or 5,212 sq.m gross based on the high growth scenario.

## 3.0 Commercial leisure and cultural uses

### Introduction

3.1 This section updates the needs assessment for other main town centre uses including commercial leisure, entertainment and cultural uses i.e., cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

### Leisure and cultural expenditure

3.2 Experian local expenditure data for the study area and projections indicates the resident population generated £151.4 million in 2022 (an average of £362 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £10.7 million;
- live entertainment i.e., theatre/concerts/shows £23.3 million;
- museums, theme parks, houses and gardens £11.6 million;
- admissions to clubs, dances, discos, bingo £13.9 million;
- other miscellaneous entertainment £25.6 million;
- subscriptions to sports and social clubs £36.4 million; and
- leisure class fees £29.9 million.

3.3 Not all leisure spend from residents in the study area will be spent in Chichester District. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 3.1. The participation and retention rates varies significantly for each activity.

Table 3.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% households participating	% trips attracted to Chichester district
Cinema	59.5	56.2
Theatre	45.5	49.3
Nightclub	3.7	0.0
Bingo	4.0	6.2
Health/fitness club	27.9	33.7
Tenpin bowling	22.4	53.7
Museum	28.2	22.6
Art gallery	19.4	55.5
Ice rink	9.9	3.8
Trampoline centre	18.0	75.7

Source: NEMS Household Survey – January 2018

3.4 Taking account these retention rates and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Chichester District attracts about 35% of resident's total leisure expenditure in the study area. Leisure expenditure attracted to Chichester District in 2022 is about £53 million (35% of £151.4 million).

## Leisure/cultural floorspace capacity

- 3.5 Experian’s expenditure projections suggest leisure expenditure per person should increase in real terms by 9.6% between 2022 to 2031, or by 17.7% between 2022 to 2039, which will generate an additional +£5.1 million by 2031 or +£9.4 million by 2039 for these activities in Chichester District. With population growth (6.1% by 2031 or 10.8% by 2039 – baseline growth scenario) expenditure on these leisure/cultural activities attracted to Chichester District should increase from £53 million to £61.6 million by 2031 and then to £69.1 million by 2039, an additional £8.6 million by 2031 or £16.1 million by 2039 (+30%). This additional expenditure could support about 2,900 sq.m of new commercial leisure and cultural floorspace by 2031, based on £3,000 per sq.m., increasing to 5,400 sq.m by 2039
- 3.6 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

### Cinemas

- 3.7 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).
- 3.8 The Cinema Advertising Association identifies 843 cinema facilities with 4,596 screens. Lichfields’ national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per screen per annum or 220 trips per seat per annum.
- 3.9 Cinema provision in Chichester District is 12 screens with 2,048 seats, as follows:
- New Park Film Centre, Chichester (1 screens / 114 seats);
  - Roundhill Picture Palace, Chichester (1 screen / 113 seats);
  - Cineworld, Chichester (10 screens / 1,921 seats).
- 3.10 British Film Institute information suggest the participation rate for visiting cinemas is 52% for adults in the UK. The 2018 household survey results suggested a slightly higher participation of 59% for household in the study area. These figures suggest a slightly higher average of 2.9 trips per person could be adopted in the Chichester study area. The population within the Chichester study area in 2022 (418,021 people) would generate around 1,087,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum) or 1,212,000 trips based on 2.9 trips per person. The household survey results suggest Chichester District attracts about 56% of cinema trips i.e., about 679,000 trips based on the higher trip rate of 2.9 trips per person. Population growth to 2039 (baseline growth scenario) suggests the number of trips attracted to Chichester District could increase to 752,000.



- 3.11 Experian's local expenditure data indicates the study area generates £10.7 million on cinema trips. This expenditure estimate appears to be consistent with the 1,212,000 cinema trip estimate i.e., an average of about £8.80 per person each trip.
- 3.12 Adopting the national average population per cinema screen (38,000 trips per screen), implies that 679,000 trips attracted to Chichester District generates demand for nearly 18 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 679,000 trips could support 3,086 seats, compared with the existing provision of 2,048 seats.
- 3.13 These projections suggest a current under-supply of 6 screens or 1,038 seats. The under-supply in 2039 could increase to 8 screens or 1,370 seats.
- 3.14 These projections suggest there is theoretical capacity for a medium sized multiplex cinema (6 to 8 screens) in Chichester. However, the longer term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

### **Theatres, nightclubs, live music and other cultural activities**

- 3.15 The 2018 household survey results indicate 45% of respondents in the study area visit theatre and 4% visit nightclubs.
- 3.16 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance is 545.
- 3.17 The household survey results indicate the participation rate for theatres is reasonably high (45%). Experian's local expenditure data indicates the study area generates £23.3 million on live theatre, concerts and shows. Chichester's market share of this expenditure should be about 49% (£11.4 million) based on the household survey results. Assuming the national average ticket revenue per venue (£5.7 million) these figures suggest there is capacity for two venues in Chichester District.
- 3.18 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 3.19 The household survey results indicate the participation rate for nightclubs/live music venues is relatively low (3.7%) and participating residents in the study area visit nightclubs/live music venues in Bognor Regis, Worthing or Portsmouth. Based on the low participation rate and access to facilities outside the District, there is no qualitative or quantitative need to provide nightclub/live music facilities in Chichester District.
- 3.20 The 2018 household survey results indicate 28% of respondents in the study area visit museums and 19% visit art galleries. Experian's local expenditure data indicates the study area generates £2.11 million on museums, theme parks, houses and garden.
- 3.21 The Novium and Pallent House Gallery in Chichester were the main named destinations in the District. Experian's local expenditure data indicates the study area generates £11.6 million on visits to museums, theme parks, houses and garden. The household survey results suggests Chichester should attract 35% of museums/art galleries trips within the study area, generating about £4.1 million. Population growth and expenditure growth (+30%) could increase this

expenditure to £5.3 million. This £1.2 million increase in expenditure could support additional facilities in the District.

- 3.22 There is a potential quantitative capacity for additional cultural facilities in the District. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

### Health and fitness clubs

- 3.23 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.
- 3.24 The Sport England/Active Places data indicates that there are 18 registered health and fitness facilities in the District, with 643 fitness stations, as shown in Table 3.2.

Table 3.2 Health and Fitness Clubs (Sport England/Active Places Data, 2022)

Name	Type	No. Fitness Stations
Bishop Luffa C of E School, Chichester	Private Use	8
Bourne Leisure Centre, Emsworth	Pay and Play	30
Champneys Forest Mere, Liphook	Registered Membership use	22
Chichester College Sports Centre	Registered Membership use	45
Chichester High School, Chichester	Private Use	22
Chichester Park Hotel Leisure Club	Registered Membership use	7
Chichester Racquets and Fitness Club	Registered Membership use	34
Highfield School, Liphook	Private Use	5
Midhurst Rother College, Midhurst	Registered Membership use	15
Nuffield Health, Chichester	Registered Membership use	105
Rookwood Road Playing Fields, Chichester	Free public access	8
Seaford College, Petworth	Sports Club/Community Assoc.	31
Spread Eagle Spa, Midhurst	Registered Membership use	15
Goodwood Hotel/Health Club, Chichester	Registered Membership use	30
The Grange, Midhurst	Pay and Play	50
The Gym, Chichester	Registered Membership use	100
University of Chichester (Bishop Otter Campus)	Private Use	26
Westgate Leisure Chichester	Pay and Play	90
<b>Total</b>		<b>643</b>

Source: Sport England Active Places – March 2022

- 3.25 The base year study area population is 418,021 people (2022). The household survey results suggest the health and fitness club participation rate is about 28% of households. Chichester District's market share of health and fitness trips is about 34%, suggesting a health and fitness catchment population of about 142,000 in 2022. This catchment population estimate indicates that Chichester District has just over 4.5 fitness stations per 1,000 people (643 registered stations in total).
- 3.26 Demand for additional facilities within Chichester District should arise from future population growth and/or increased participation rates. As indicated above, the study area population generates £36.4 million on subscriptions to sports and social clubs. Chichester District's share of this expenditure is £12.4 million (34%), which equates to about £19,300 per fitness station.

- 3.27 Experian’s expenditure projections suggest leisure expenditure per person should increase in real terms by 17.7% between 2022 to 2039, which is likely to include an increase in participation rates. With population growth (+10.8%) expenditure on this activity should increase from £12.4 million to £16.1 million by 2039, an additional +£3.7 million. Based on £19,300 per fitness station, this additional expenditure could support 192 new fitness stations by 2039, about 4 medium sized facilities.
- 3.28 The South East region has 1,099 Sport England registered health and fitness facilities with 57,457 fitness stations (average of 52 stations per facility). This existing provision equates to about 6.2 registered fitness stations per 1,000 people in the South East region. Chichester’s health and fitness catchment population has a slightly lower provision of fitness registered stations (4.5 stations per 1,000 people) than the South East average (6.2 stations), suggesting lower participation rates and/or a relative under-supply of fitness stations.
- 3.29 The slightly lower provision in Chichester District may be due to the demographic profile of the District (lower participation rates). However, if Chichester’s provision increased from 4.5 stations per 1,000 people to 6.2 stations per 1,000 then the number of fitness stations would increase from 643 to 880 stations, an increase of +237 or about 5 medium sized facilities.
- 3.30 Based on the analysis above, there could be potential for between 4 to 5 additional health and fitness facilities in the District up to 2039, depending on the degree to which participation rates increase in the future.

### **Tenpin bowling, family entertainment and other indoor leisure innovations**

- 3.31 Across the country freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for family entertainment activities including trampolines, climbing, escape rooms, ice and roller skating and indoor golf etc. These leisure innovations are likely to continue and a flexible approach is required to respond to arising opportunities.
- Tenpin Chichester is the only major facility in the District with 16 tenpin bowling lanes. The household survey results suggested the tenpin bowling participation rate was about 22% of households. Chichester District’s market share of tenpin bowling trips was 57%. This market share suggests a tenpin bowling catchment population of about 238,000 in 2022. This base year catchment area population could theoretically support 20 tenpin bowling lanes, based on one lane per 12,000 people (national average). Population growth within the study area between 2022 and 2039 would increase the theoretical capacity to about 22 lanes. Chichester’s existing provision (16 bowling lanes) appears to be adequate to meet most of the demand over the plan period. The residual theoretical capacity at 2039 (6 lanes) is insufficient to support a new facility in the District.
- 3.32 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK’s first indoor trampoline centre was opened by Bounce in 2014.
- 3.33 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms. Chichester is well served with two trampoline facilities but has limited other family entertainment activities. Trampoline and some other family entertainment activities are still relatively new and their potential for continued growth is unclear. The strategy for Chichester

should be flexible to respond to any emerging demand for trampoline centres and other family entertainment activities.

### **Bingo, games of chance and gambling**

3.34 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e., converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

3.35 The Gambling Commission indicates there were 601 bingo facilities in Great Britain (August 2020) and 131 casinos. The number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The latest figures equate to approximately one bingo facility per 110,000 people, and one casino per 480,000 people. Population in the Chichester study area (418,021) is theoretically sufficient to support at least 3 bingo facilities and perhaps one casino, based on the national averages.

3.36 There are no major bingo facilities in Chichester but there are Crown Bingo outlets in Bognor Regis and Havant. There is theoretical scope for a bingo facility in Chichester, although the national decline in the number of bingo premises and increase on-line gambling suggest there may limited operator demand to open new facilities.

### **Conclusions on commercial leisure and other town centre uses**

3.37 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g., exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 10-15 years.

3.38 In global terms future expenditure from the catchment population could support about 5,400 sq.m of new commercial leisure and cultural floorspace by 2039. This additional floorspace could for example include:

- a medium sized multiplex cinema (6 to 8 screens);
- 4 to 5 medium sized health and fitness facilities;
- museums or art galleries; and
- a bingo club.

3.39 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

## 4.0 Accommodating growth

### Introduction

- 4.1 The National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability.

### Floorspace capacity projections

- 4.2 Tables 4.1, 4.2 and 4.3 summarise the floorspace projections for convenience and comparison goods retail and food/beverage uses by broad location up to 2031, 2035 and 2039, adopting the baseline population growth scenario. The distribution of floorspace is based on the existing market shares and expenditure patterns.

Table 4.1 Summary of floorspace projections up to 2026 (sq.m gross) – baseline growth scenario

	Convenience	Comparison	Food/beverage	Total
Chichester	-692	-3,457	1,130	-3,019
Selsey	-71	-105	96	-80
E.Wittering/Bracklesham	-34	-35	47	-22
Chichester rural	-46	-15	88	27
<b>Total</b>	<b>-844</b>	<b>-3,613</b>	<b>1,361</b>	<b>-3,096</b>

Table 4.2 Summary of floorspace projections up to 2031 (sq.m gross) – baseline growth scenario

	Convenience	Comparison	Food/beverage	Total
Chichester	155	-463	2,293	1,985
Selsey	15	-18	197	194
E.Wittering/Bracklesham	7	-5	97	99
Chichester rural	10	-3	178	185
<b>Total</b>	<b>188</b>	<b>-488</b>	<b>2,765</b>	<b>2,465</b>

Table 4.3 Summary of floorspace projections up to 2035 (sq.m gross) – baseline growth scenario

	Convenience	Comparison	Food/beverage	Total
Chichester	914	1,772	3,026	5,712
Selsey	94	49	262	405
E.Wittering/Bracklesham	45	18	130	193
Chichester rural	61	7	236	304
<b>Total</b>	<b>1,113</b>	<b>1,846</b>	<b>3,653</b>	<b>6,612</b>

Table 4.4 Summary of floorspace projections up to 2039 (sq.m gross) – baseline growth scenario

	Convenience	Comparison	Food/beverage	Total
Chichester	1,606	4,470	3,710	9,786
Selsey	167	130	324	621
E.Wittering/Bracklesham	80	46	160	286
Chichester rural	107	19	289	415
<b>Total</b>	<b>1,959</b>	<b>4,665</b>	<b>4,483</b>	<b>11,108</b>

Source: Table 11A in Appendix 2, Table 10A in Appendix 3 and Table 10A Appendix 4.

4.3 The combined floorspace projections from the capacity assessment appendices suggest an over-supply of floorspace in the short term up to 2026, but there is an emerging modest requirement for additional floorspace by 2031 (2,465 sq.m gross).

4.4 This additional expenditure could support about 2,900 sq.m of new commercial leisure and cultural floorspace by 2031, based on £3,000 per sq.m., increasing to 5,400 sq.m by 2039

### **Loss of retail and proliferation of other uses**

4.5 The short-term projections up to 2026, suggest the amount of retail (convenience and comparison goods) floorspace in Chichester city centre could reduce by over 4,400 sq.m gross. Goad Plan data suggested the city centre had retail floorspace of about 58,700 sq.m gross in 2017. Food and beverage uses and other non-retail services (within the previous class A categories) was around 26,400 sq.m gross, with about 4,700 sq.m gross vacant floorspace. This data for 2017 suggests retail uses occupied about two thirds of the city centres floorspace within shop premises.

4.6 The latest available information suggests the number of vacant units in Chichester city centre has increased marginally from 32 in 2017 to 38 in October 2021, but the amount of vacant floorspace in Chichester city centre has increased significantly due to the closure of the House of Fraser store. Overall, the amount of vacant floorspace in the city centre may have increased from 4,700 sq.m to about 11,500 sq.m. The proportion of occupied retail floorspace could have reduced from 58,700 sq.m gross in 2017 to about 52,000 sq.m gross in 2021. A further 4,400 sq.m gross reduction in retail floorspace by 2026, would represent a 19% reduction from the 2017 position.

4.7 The floorspace projections suggest food and beverage uses could occupy some of the vacated retail floorspace (about 1,400 sq.m gross by 2026), but other non-retail services may need to be attracted to prevent the shop vacancy rate increasing in the short term.

4.8 Medium term projection to 2031 suggest a smaller reduction in retail floorspace (300 sq.m gross), which would represent a 12% reduction from the 2017 position. This reduction should be more than offset by the potential growth in the food and beverage sector (+2,765 sq.m gross).

4.9 The longer term projections to 2035 suggests a modest increase from the current position with retail floorspace capacity for 2,959 sq.m gross. If achieved, occupied retail floorspace would return to about 55,000 sq.m gross, about 6% below the 2017 position. Potential occupied retail floorspace at 2039 could increase to 58,600 sq.m gross, marginally below the 2017 positions (58,700 sq.m gross).

4.10 In 2017 there were 47 vacant shop units within Chichester city centre, Selsey, East Wittering and Bracklesham, which equated to an overall vacancy rate of 7.8%, lower than the Goad national average of 11.2% at that time. The latest available information (October 2021) suggests the number of vacant units in Chichester city centre has increased marginally, but other centres have not experienced a significant increase in vacant units. Centres in the District are still performing relatively healthily, in comparison with many other town centres across the country.

4.11 As indicated in the RMTCUS 2018, the existing stock of premises should help to accommodate projected growth. The retail capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace should help to accommodate residual future growth.

- 4.12 The RMTCUS 2018 assumed that up to half of the existing vacant floorspace could be reoccupied and that re-occupied vacant space to accommodate up to 3,100 sq.m gross. The amount of vacant floorspace in Chichester city centre has increased significantly due to the closure of the House of Fraser store. Total vacant floorspace is now about 11,500 sq.m gross.
- 4.13 As indicated in the RMTCUS 2018, many high street multiple comparison retailers have changed their format and have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres. Demand for space has decreased during the Covid-19 crisis and, of those national multiples looking for space, are likely to prefer to locate in larger centres, such as Chichester. However, given the historic nature of Chichester city centre, many of the existing units are narrow fronted and the unit configuration could constrain operator demand. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Two thirds of the vacant units in Chichester city centre are relatively small with shop frontages of less than 10 metres.
- 4.14 Notwithstanding these constraints, it is still reasonable to assume half the current vacant floorspace can be reoccupied. On this basis, the following new floorspace could be accommodated:
- Chichester city centre            5,700 sq.m gross
  - Selsey                                    500 sq.m gross
  - East Wittering/Bracklesham    200 sq.m gross
- 4.15 If this reduction in vacant units can be achieved, then the overall retail and food/beverage floorspace projections up to and beyond 2031 could be accommodated by the existing stock rather than new development. The long-term 2039 projection for the District would reduce from about 11,100 sq.m gross to only 4,700 sq.m gross. These projections and vacant floorspace estimates suggest there is no pressing need to identify major new allocations for retail and food/beverage development, particularly up to 2031.
- 4.16 The RMTCUS 2018 suggested the application of shop frontage policies could help encourage the reoccupation of vacant retail space, reducing the need to allocate sites to accommodate residual floorspace capacity.
- 4.17 The short term projections to 2026 suggest there is likely to be limited demand to reoccupy vacant floorspace, particularly in Chichester city centre with an over-supply of retail floorspace. However, the need to retain retail floorspace in the medium and longer term (up to 2031, 2035 and 2039) needs to be considered. The policy options for shop frontage policies are explored in Section 5.
- 4.18 The combined floorspace projection up to 2031 (2,465 sq.m gross) relates to convenience goods shopping and food/beverage uses rather than comparison goods shopping. New convenience goods shopping will be required to serve new residential developments in the form of local/ neighbourhood centres, rather than new uses focused in Chichester city centre. Some of the projected food/beverage floorspace will also be provided in these neighbourhood centres. The retention or expansion of comparison goods retail floorspace within Chichester city centre is not a short or medium term priority and a more flexible approach to accommodate food/beverage uses and other non-retail uses should be considered, notwithstanding the changes to the UCO. The potential options are assessed in the next section.

## Development opportunities

- 4.19 The RMTCUS 2018 reviewed potential development opportunities within the District's main centres. In Chichester city centre, 14 potential development sites were identified, with a theoretical capacity to accommodate over 29,500 sq.m gross of retail and food/beverage floorspace.
- 4.20 Five of these potential development sites now form part of the proposed Strategic Site Allocation AL5 - Southern Gateway within the Chichester Local Plan Review 2035 – Preferred Approach (December 2018). This proposed allocation covers a large area (12 hectares) on the southern fringe of the city centre. The Council reaffirmed its commitment to the regeneration of the Southern Gateway in December 2021. The proposed allocation included mixed commercial space of about 21,600 sq.m including 9,300 sq.m of employment uses and 350 dwellings. The mixed commercial uses were expected to include retail and leisure uses (the allocation implied up to 12,300 sq.m gross). Policy S9 implied up to 9,500 sq.m gross of comparison goods retail floorspace could be provided at Southern Gateway.
- 4.21 The updated combined floorspace projection for Chichester (11,100 sq.m gross at a later 2039 end year) is significantly lower than the previous projection (down from 35,300 sq.m gross at 2036). Furthermore, the theoretical ability of vacant floorspace to accommodate growth in the city centre has increased from 2,400 sq.m gross to 5,700 sq.m gross, potentially leaving limited residual requirement in this location.
- 4.22 The Southern Gateway strategic allocation is more than sufficient to accommodate the full Chichester retail/food beverage floorspace projection (about 9,800 sq.m gross) over the full period up to 2039, excluding any allowance for the re-occupation of vacant floorspace. The Southern Gateway allocation provides significant flexibility should floorspace projections increase in the future.
- 4.23 Other strategic allocation allocations on the edge of Chichester's settlement boundary are expected to include new neighbourhood centres, as follows:
- AL1 - land west of Chichester (1,600 homes - neighbourhood centre);
  - AL2 - land at Shopwyck (585 homes - neighbourhood centre);
  - AL3 - land east of Chichester (600 homes - neighbourhood centre); and
  - AL6 - land south west of Chichester (100 homes /employment - neighbourhood centre).
- 4.24 The scale of these neighbourhood centres is not specified within each allocation, but the new centres should be small scale, serving local needs. The new centres are likely to include small convenience stores, lower order comparison shops e.g. pharmacists and hardware/home products and other non-retail services including food/beverage outlets.
- 4.25 The strategic allocations are expected to provide about 2,900 dwellings and should have a resident population of at least 6,000 people. Lichfield would normally expect local shops and services within strategic residential allocations to retain up to 30% of convenience goods expenditure (i.e. top up rather than main food and grocery trips); 10% of comparison goods expenditure (i.e. lower order day to day goods) and about 20% of food/beverage expenditure.
- 4.26 The scale of these strategic allocations (2,900 dwellings) is likely to support about 1,500 sq.m gross of retail and food/beverage floorspace, which would account for about 15% of the total Chichester projection at 2039 (9,800 sq.m gross). As indicated above, the reoccupation of vacant floorspace in Chichester city centre (5,700 sq.m gross) could accommodate a further 58% leaving a residual requirement of only about 2,600 sq.m gross in Chichester by 2039.



- 4.27 The Southern Gateway allocations could accommodate any residual requirement. This opportunity area could accommodate leisure, entertainment, cultural and other main town centre uses e.g., health and fitness, hotels and tourist attractions. The implied scope for retail and leisure uses (12,300 sq.m gross) within the AL5 strategic allocation is more than sufficient to meet potential demand over the plan period. This could include a small element of convenience goods retailing and services for the proposed employment and residential uses within the development area. In sequential terms retail, food and beverage and leisure uses should be accommodated to the north of the railway station, closest to the city centre boundary.
- 4.28 Elsewhere in the District, the combined floorspace projections in 2039 is about 1,300 sq.m gross. Vacant premises in Selsey and East Wittering/Bracklesham could accommodate over half of the floorspace projection for these settlements (700 sq.m gross of 1,300 sq.m gross by 2039). Any residual demand could be met by small in-fill developments and/or shop extensions including the use of upper floors. There is no pressing need to identify allocations for new retail or food/beverage floorspace in Selsey, East Wittering or Bracklesham.
- 4.29 The strategic allocation at land west of Tangmere (AL24) includes 1,300 dwellings and a new village centre. This new village centre could meet the remaining floorspace projection for the District (about 600 sq.m gross at 2039).

## 5.0 Policy review

### National policy and other changes

- 5.1 The RMTCUS 2018 reviewed adopted town centre and retail policies, including shopping frontage and boundary policies options. The RMTCUS was based on the guidance set out in the NPPF (published by the Department for Communities and Local Government on 27 March 2012). The latest NPPF (as amended July 2021) indicates planning policies should (para. 86):
- define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
  - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
  - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
  - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
  - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
  - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 5.2 In relation to town centres, the latest NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years.
- 5.3 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to respond to ‘rapid changes in the retail and leisure industries’. Accordingly, planning policies should clarify ‘the range of uses permitted in such locations, as part of a positive strategy for the future of each centre’.
- 5.4 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings
- 5.5 The RMTCUS noted the need for town centres to maintain their primary retail function, whilst increasing their diversity with a range of complementary uses. The appropriate balance between retail and other town centre activity has been hotly debated in recent years, as town centres increasingly need to compete with on-line shopping. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

- 5.6 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 5.7 This section reviews the previous policy recommendations taking account the latest NPPF and other changes.

### **Strategy and retail hierarchy**

- 5.8 The emerging Local Plan Review (LPR) sets out an overall strategy for the plan area. Consistent with the NPPF the strategy seeks to improve the vitality and viability of the District's city, local and village centres by improving and enhancing the resilience of the centres. It suggests the retail function and character of each centre should be safeguarded, but also recognises the need to encourage a diversity of uses within centres, enabling a range of retail, leisure, social, education, arts, cultural, office, commercial and, where appropriate, residential uses. The importance of enhancing the early evening and night-time economy is identified.
- 5.9 The NPPF (paragraph 86) indicates that planning policies should define a network and hierarchy of centres and promote their vitality and viability. The PPG indicates that planning policies should identify a realistic role, function and hierarchy of town centres over the plan period and establish a vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- 5.10 The objectives are consistent with guidance within the NPPF, PPG and the update floorspace capacity projections.
- 5.11 The emerging LPR continues to define a three tier network of centres, as follows:
- Chichester City Centre (defined as Town Centre on the Policies Map);
  - Selsey and East Wittering (defined as Local Centres on the Policies Map); and
  - Bosham, Bracklesham, Southbourne, Tangmere and Westbourne (Village Centres to be defined in neighbourhood plans or subsequent Site Allocations DPD).
- 5.12 Chichester City continues to be the dominant centre in the District, serving a sub-regional catchment area and is a major tourist and visitor destination. Based on the scale of facilities available within each settlement and the floorspace projections in this update, this network/hierarchy is appropriate.

### **Meeting needs over the plan period**

- 5.13 It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the latest NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. Identifying sites to meet needs for ten years or the full plan period is no longer a critical issue in Chichester District because the updated long term floorspace projections are much lower.

- 5.14 In line with the Government’s economic growth agenda, a positive approach to meeting community needs is still required. The NPPF’s presumption in favour of sustainable development (paragraph 11) remains. For plan-making this means that:
- plans should promote sustainable patterns of development that meet the needs of their area; and
  - policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas.
- 5.15 The preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, accounting for relevant market signals (paragraph 31).
- 5.16 The LPR should sets out a floorspace projections for convenience and comparison goods retail floorspace and food/beverage uses.
- 5.17 As indicated in Table 3.3 in Section 3, most (88%) of the revised floorspace projection for the District still relates to Chichester City. However, the floorspace projections suggest a mix of comparison and convenience goods retail and food/beverage floorspace is required. The emerging LPR would benefit from a more detailed breakdown of required floorspace across the District and over the plan period, as shown in Table 5.1 below.

Table 5.1 Retail and food/beverage floorspace projections up to 2039 (sq.m gross)

	Convenience	Comparison	Food/beverage	Total
Chichester city	1,600	4,500	3,700	9,800
Other Chichester District	300	200	800	1,300
<b>Total</b>	<b>1,900</b>	<b>4,700</b>	<b>4,500</b>	<b>11,100</b>

- 5.18 Emerging policy correctly indicates these floorspace projections can be met through the re-occupation of vacant floorspace, as well as new development within strategic sites, including new neighbourhood village centres.
- 5.19 Despite the recent changes to the UCO, the LPR should still refer to separate retail and food/beverage floorspace projections, which do not need to be merged with other uses in Class E, such as office and leisure uses. Historically, development plans have included separate floorspace projections for comparison and convenience goods retail although they both fell within Class A1, along with other non-retail services. Under the old system, there were permitted development rights for all food and beverage uses to change to Class A1. In a similar way, retail and restaurant/café uses now fall into one new Class E, whilst pubs/bars and takeaways are Sui Generis with no permitted changes.
- 5.20 The Council can still impose conditions on new development that restrict changes within the new Class E, in the same way comparison, convenience goods retail floorspace and the sale of specific types of goods have been controlled via conditions for many years. The floorspace projections in this study and retail impact assessments should help to determine when these types of conditions are necessary and appropriate.

## Impact and sequential tests

- 5.21 The NPPF (paragraph 90) states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:

- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
  - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 5.22 The NPPF (paragraph 87) indicates local planning authorities should apply a sequential test for main town centre uses, but (paragraph 89) the sequential approach should not be applied to small scale rural development.
- 5.23 The emerging Local Plan Review correctly directs main town centre uses to the City and Local Centres, as defined in the hierarchy shown above. The sequential test applies to all main town centre uses proposed outside the city, local and village centres and the impact test applies to all development outside the city and local centres. The expansion and additional provision of facilities in local and village centres is supported provided the scale of development is appropriate to the existing settlement or the planned expansion of that settlement and where expansion adds to the range and accessibility of goods and services.
- 5.24 The RMTCUS 2018 reviewed the designation of primary shopping areas and town centre boundaries in Chichester District. These designations remain important when applying the sequential test, i.e., to direct retail, leisure and other main town centre uses to sustainable locations and determine whether a retail/leisure impact assessment is required.
- 5.25 The latest NPPF still indicates that the first preference for retail uses should be the primary shopping area, where retail development is concentrated. The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the town centre.
- 5.26 The validity of this approach is now questionable with the merger of retail with many other main town centre uses into the new Class E. For example, a proposed leisure use within Class E will satisfy the sequential approach if it is located within the town centre boundary but outside the primary shopping area. This proposed leisure use can subsequently change to retail use without planning permission. With the introduction of Class E, the effectiveness of a separate primary shopping area for sequential test purposes is unclear.
- 5.27 The Local Plan Review should define town and local centre boundaries on the proposals map. For the reasons outlined above, a primary shopping area for Chichester city centre (or any other centre) is not considered to be necessary or appropriate due to the UCO changes. The centre boundaries will provide clarification in relation to the need for an impact and sequential assessment.
- 5.28 As indicated above, the NPPF indicates impact assessments are only required for retail and leisure uses, rather than all main town centre uses. For example, impact assessments are not required for office and hotel developments. Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, emerging policy relating to the impact test correctly refers to retail and leisure uses rather than the new UCO classes.
- 5.29 The emerging Local Plan Review adopts the NPPF minimum impact threshold of 2,500 sq.m gross for out-of-centre retail and leisure development in Chichester. Lower thresholds are proposed for local centres (over 500 sq.m gross) and village centres (250 sq.m gross).
- 5.30 As indicated in the RMTCUS 2018, the NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate blanket threshold across Chichester District, because this scale of

development would represent a significant proportion of the overall retail projections for parts of the District. These recommendations remain unchanged and the adoption of lower thresholds for development that would affect local and village centres (500 and 250 sq.m gross respectively) are endorsed by the updated (lower) floorspace capacity projections and recent market conditions.

### **Chichester city centre**

- 5.31 The emerging LPR adopts a balanced approach that recognises the need to maintain and enhance the City's retail position as well as the early evening and night-time economy. There is still a need to protect retail uses previously categorised as Class A1 uses within the city centre. However, recent changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 5.32 Considering current and likely future market trends, the updated (lower) retail floorspace capacity projections, and changes to the UCO and PDR described earlier, restrictive policies may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e., new Class E.
- 5.33 The introduction of restrictive shop frontage policies could be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the updated retail floorspace projections are much lower than previous projections, particularly comparison goods retail. The continuation of the previous policy approach would be undermined and hampered by the UCO/PDR changes. Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations.
- 5.34 The LPR retains primary and secondary shopping frontages within the city centre to manage the mix of uses and protect the vitality and viability of the centre.
- 5.35 Within primary shopping frontages the retail offer will be enhanced and uses within Class E will be retained whilst maintaining an active frontage. Within secondary frontages, a wider range of main town centre uses including Class E, Sui Generis and Class F will be protected.
- 5.36 To achieve these aims, emerging LPR policy encourages proposals for Class E uses within the primary shopping frontages. Emerging LPR policy encourages proposals for Class E uses Sui Generis and Class F within the secondary shopping frontages and offers more flexibility. Proposals that require planning permission that would result in the loss of these uses at ground floor level will only be permitted subject to criteria relating to:
- individual or cumulative impact on neighbouring amenity;
  - adverse impact on the vitality and viability of the city centre as a whole;
  - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
  - adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in secondary frontages.
- 5.37 Encouraging Class E uses within both primary and secondary frontages will include main town centre uses not previously permitted at ground floor level e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses are

encouraged in the secondary frontages where appropriate i.e., preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. This approach will allow significant flexibility across the city centre.

5.38 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of the centre. However, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within the centre.

5.39 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in the city centres.

### **Local and village centres**

5.40 The emerging LPR recognises the important role played by local and village centres in serving day to day needs. Small scale development of a mix of town centre uses is supported and development outside centres is required to satisfy the impact and sequential tests.

5.41 Changes of use that would result in a reduction in shopping facilities will be restricted and the continued use for Class E and other main town centre uses is supported, subject to local need and marketing criteria.

## 6.0 **Conclusions and recommendations**

### **Accommodating growth**

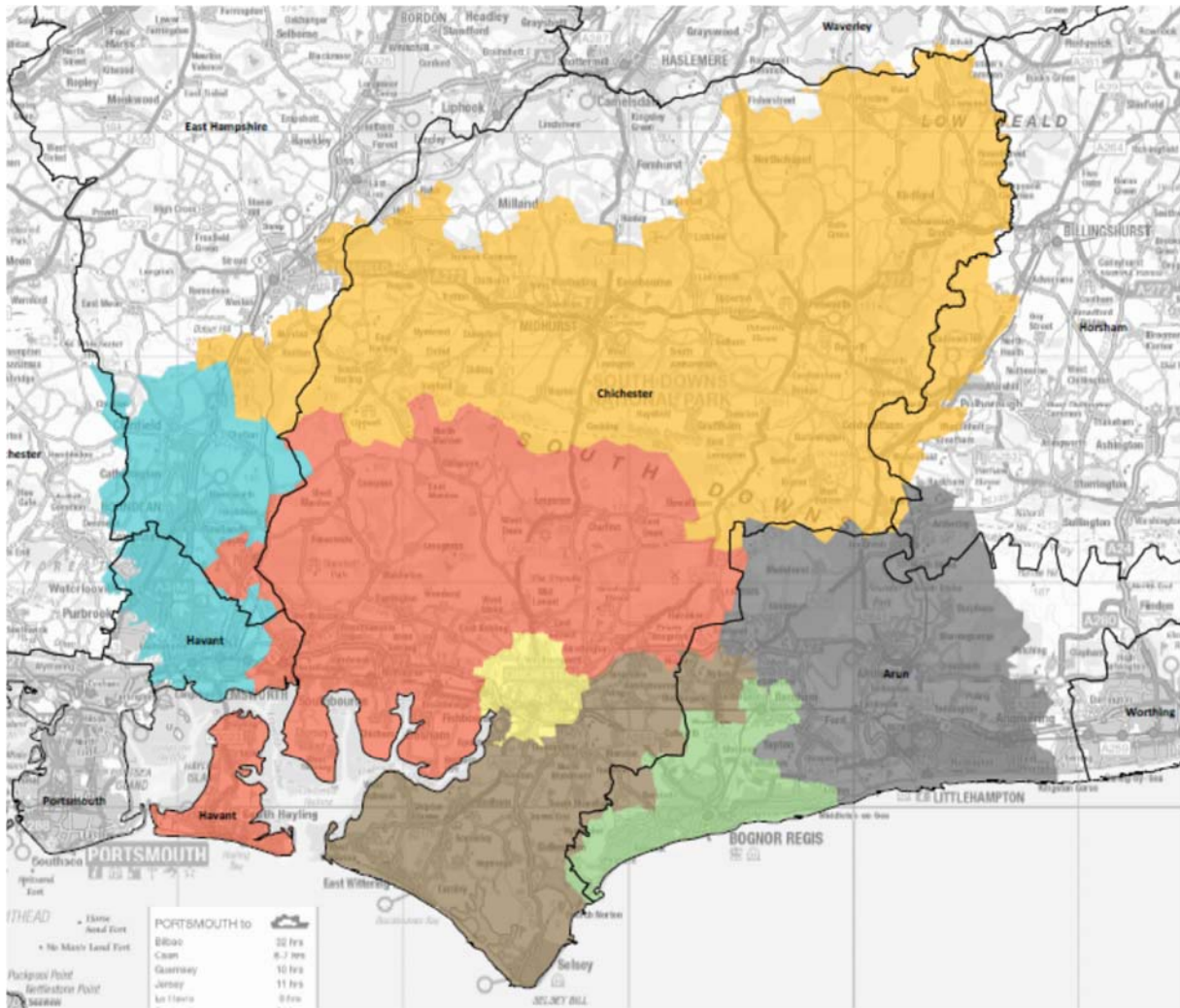
- 6.1 This updated indicates the projected capacity for retail and food/beverage floorspace has reduced significantly since the RMTCUS 2018 was prepared. The revised projections suggest a mix of comparison and convenience goods retail and food/beverage floorspace is require up to 2039 totalling 11,100 sq.m gross. Emerging LPR policy should indicate this floorspace projection can be accommodated through the re-occupation of vacant floorspace and new neighbourhood and village centres within strategic allocations (about 1,500 sq.m gross). Any long term residual requirement could be accommodated at the Southern Gateway, taking account of the sequential test.

### **Other policy options**

- 6.2 Based on the scale of facilities available within each settlement and the retail floorspace projections in this update study, the retail hierarchy within the emerging LPR remains appropriate and sound.
- 6.3 The NPPF minimum impact threshold of 2,500 sq.m gross is an inappropriate blanket threshold across Chichester District. The emerging LPR proposes appropriate impact thresholds, now endorsed by the updated (lower) floorspace capacity projections and recent market conditions.
- 6.4 The LPR should define town and local centre boundaries on the proposals map. However, a separate primary shopping area for Chichester city centre is not considered to be necessary or appropriate following the UCO changes. The centre boundaries should provide sufficient clarification in relation to the need for an impact and sequential assessment.
- 6.5 Current and future market trends, the lower retail floorspace capacity projections, changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centre should be adopted.
- 6.6 Future policy seeks to encourage all Class E uses within the town, local and village centres and provides an appropriate flexible approach.










# **Appendix 1 Study area and population**



**Key**

 Local Authority Boundary

**Survey Zones:**

-  Zone 1
-  Zone 2
-  Zone 3
-  Zone 4
-  Zone 5
-  Zone 6
-  Zone 7

**Table 1A - Study area population projections (baseline growth)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	33,959	34,902	36,040	36,896	37,718
Zone 2 - Hayling Island/South Downs/Southbourne	56,724	58,300	60,200	61,630	63,003
Zone 3 - Selsey/East Wittering/Bracklesham	35,630	36,620	37,813	38,712	39,574
Zone 4 - Bognor Regis	75,478	77,737	80,245	82,049	83,672
Zone 5 - South Downs (North)	32,220	33,135	34,122	34,771	35,359
Zone 6 - Arundel/Littlehampton	77,946	80,516	83,392	85,436	87,385
Zone 7 - Waterlooville/Havant	106,064	108,787	111,850	114,163	116,472
<b>Total</b>	<b>418,021</b>	<b>429,998</b>	<b>443,662</b>	<b>453,658</b>	<b>463,182</b>

Sources:

Projected Population change Chichester Planning Authority Area with delivery of 532 dwellings per annum (Zones 1, 2 and 3).

Experian population projections (Zones 4, 5, 6 and 7)

**Table 1B - Study area population projections (high growth)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	33,959	35,082	36,461	37,524	38,563
Zone 2 - Hayling Island/South Downs/Southbourne	56,724	58,601	60,903	62,679	64,414
Zone 3 - Selsey/East Wittering/Bracklesham	35,630	36,809	38,255	39,371	40,461
Zone 4 - Bognor Regis	75,478	77,737	80,245	82,049	83,672
Zone 5 - South Downs (North)	32,220	33,135	34,122	34,771	35,359
Zone 6 - Arundel/Littlehampton	77,946	80,516	83,392	85,436	87,385
Zone 7 - Waterlooville/Havant	106,064	108,787	111,850	114,163	116,472
<b>Total</b>	<b>418,021</b>	<b>430,668</b>	<b>445,228</b>	<b>455,993</b>	<b>466,326</b>

Sources:

Projected Population change Chichester Planning Authority Area with delivery of 608 dwellings per annum (Zones 1, 2 and 3).

Experian population projections (Zones 4, 5, 6 and 7)



## **Appendix 2 Convenience goods capacity**

**Table 1 - Convenience goods expenditure per person per annum (£)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	2,557	2,540	2,539	2,544	2,545
Zone 2 - Hayling Island/South Downs/Southbourne	2,788	2,770	2,769	2,774	2,776
Zone 3 - Selsey/East Wittering/Bracklesham	2,665	2,648	2,647	2,652	2,654
Zone 4 - Bognor Regis	2,507	2,490	2,489	2,494	2,496
Zone 5 - South Downs (North)	2,973	2,954	2,952	2,958	2,960
Zone 6 - Arundel/Littlehampton	2,574	2,557	2,556	2,560	2,562
Zone 7 - Waterlooville/Havant	2,443	2,427	2,426	2,430	2,432

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a

Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5

**Table 2A - Total convenience goods expenditure (£m) - baseline growth**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	86.83	88.65	91.50	93.85	95.99
Zone 2 - Hayling Island/South Downs/Southbourne	158.15	161.47	166.67	170.95	174.90
Zone 3 - Selsey/East Wittering/Bracklesham	94.95	96.96	100.08	102.65	105.03
Zone 4 - Bognor Regis	189.22	193.59	199.76	204.63	208.85
Zone 5 - South Downs (North)	95.79	97.87	100.74	102.85	104.66
Zone 6 - Arundel/Littlehampton	200.63	205.85	213.12	218.75	223.88
Zone 7 - Waterlooville/Havant	259.11	263.99	271.32	277.44	283.26
<b>Study Area Total</b>	<b>1,084.69</b>	<b>1,108.38</b>	<b>1,143.20</b>	<b>1,171.11</b>	<b>1,196.56</b>

Source: Tables 1A, Appendix 1 and Table 1, Appendix 2

**Table 2B - Total convenience goods expenditure (£m) - high growth**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	86.83	89.10	92.57	95.45	98.14
Zone 2 - Hayling Island/South Downs/Southbourne	158.15	162.31	168.62	173.86	178.81
Zone 3 - Selsey/East Wittering/Bracklesham	94.95	97.46	101.25	104.39	107.38
Zone 4 - Bognor Regis	189.22	193.59	199.76	204.63	208.85
Zone 5 - South Downs (North)	95.79	97.87	100.74	102.85	104.66
Zone 6 - Arundel/Littlehampton	200.63	205.85	213.12	218.75	223.88
Zone 7 - Waterlooville/Havant	259.11	263.99	271.32	277.44	283.26
<b>Study Area Total</b>	<b>1,084.69</b>	<b>1,110.17</b>	<b>1,147.39</b>	<b>1,177.37</b>	<b>1,204.99</b>

Source: Tables 1B, Appendix 1 and Table 1, Appendix 2

**Table 3 - Base year 2022 convenience goods market shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Aldi, Barnfield Drive, Chichester	7.3%	3.8%	4.9%	1.2%	3.4%	0.3%	0.0%	4.0%
Lidl, Portfield Way, Chichester	6.3%	1.3%	3.5%	0.6%	1.5%	0.0%	0.0%	4.0%
Sainsbury's, Westhampnett Road, Chichester	19.9%	9.4%	16.2%	1.5%	6.6%	1.4%	0.0%	4.0%
Tesco Extra, Fishbourne Road East, Chichester	27.9%	6.9%	19.4%	1.2%	5.4%	0.3%	1.5%	4.0%
Waitrose, Via Ravenna, Chichester	10.9%	5.2%	4.9%	0.9%	0.7%	2.7%	0.0%	5.0%
Other Chichester	24.2%	6.8%	4.5%	4.6%	2.2%	0.9%	0.5%	4.0%
Asda, Selsey	0.0%	0.2%	12.6%	0.0%	0.0%	0.0%	0.0%	3.0%
Selsey	0.0%	0.0%	13.3%	0.0%	0.0%	0.0%	0.0%	2.5%
East Wittering/Bracklesham	0.6%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	2.5%
Chichester rural	0.6%	7.5%	2.5%	0.6%	0.3%	0.0%	0.0%	2.5%
<b>Chichester District Total</b>	<b>97.7%</b>	<b>41.1%</b>	<b>93.8%</b>	<b>10.6%</b>	<b>20.1%</b>	<b>5.6%</b>	<b>2.0%</b>	<b>n/a</b>
Bognor Regis	0.5%	0.5%	5.8%	85.9%	1.6%	2.2%	0.0%	n/a
Haslemere	0.0%	0.0%	0.0%	0.0%	4.5%	0.1%	0.2%	n/a
Havant/Waterlooville	1.0%	54.6%	0.4%	0.3%	2.0%	0.2%	89.0%	n/a
Horsham	0.0%	0.0%	0.0%	0.6%	3.0%	0.3%	1.5%	n/a
Littlehampton	0.2%	0.7%	0.0%	2.3%	1.1%	80.5%	0.2%	n/a
Midhurst	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.9%	n/a
Petersfield/Liss	0.0%	0.0%	0.0%	0.0%	18.9%	0.0%	0.6%	n/a
Portsmouth	0.3%	2.9%	0.0%	0.3%	0.3%	1.0%	4.4%	n/a
Worthing	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	n/a
Other	0.3%	0.2%	0.0%	0.0%	39.6%	3.3%	1.2%	n/a
<b>Other Total</b>	<b>2.3%</b>	<b>58.9%</b>	<b>6.2%</b>	<b>89.4%</b>	<b>79.9%</b>	<b>94.4%</b>	<b>98.0%</b>	<b>n/a</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>n/a</b>

Source: NEMS Household Survey January 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' estimates

**Table 4 - Base year 2022 convenience goods expenditure patterns (£M)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2022</b>	<b>86.83</b>	<b>158.15</b>	<b>94.95</b>	<b>189.22</b>	<b>95.79</b>	<b>200.63</b>	<b>259.11</b>		<b>1,084.69</b>
Aldi, Barnfield Drive, Chichester	6.34	6.01	4.65	2.27	3.26	0.60	0.00	0.96	24.09
Lidl, Portfield Way, Chichester	5.47	2.06	3.32	1.14	1.44	0.00	0.00	0.56	13.98
Sainsbury's, Westhampnett Road, Chichester	17.28	14.87	15.38	2.84	6.32	2.81	0.00	2.48	61.98
Tesco Extra, Fishbourne Road East, Chichester	24.23	10.91	18.42	2.27	5.17	0.60	3.89	2.73	68.22
Waitrose, Via Ravenna, Chichester	9.46	8.22	4.65	1.70	0.67	5.42	0.00	1.59	31.72
Other Chichester	21.01	10.75	4.27	8.70	2.11	1.81	1.30	2.08	52.03
Asda, Selsey	0.00	0.32	11.96	0.00	0.00	0.00	0.00	0.38	12.66
Selsey	0.00	0.00	12.63	0.00	0.00	0.00	0.00	0.32	12.95
East Wittering/Bracklesham	0.52	0.00	11.39	0.00	0.00	0.00	0.00	0.31	12.22
Chichester rural	0.52	11.86	2.37	1.14	0.29	0.00	0.00	0.41	16.59
<b>Chichester District Total</b>	<b>84.84</b>	<b>65.00</b>	<b>89.07</b>	<b>20.06</b>	<b>19.25</b>	<b>11.24</b>	<b>5.18</b>	<b>11.82</b>	<b>306.45</b>
Bognor Regis	0.43	0.79	5.51	162.54	1.53	4.41	0.00		175.22
Haslemere	0.00	0.00	0.00	0.00	4.31	0.20	0.52		5.03
Havant/Waterlooville	0.87	86.35	0.38	0.57	1.92	0.40	230.61		321.09
Horsham	0.00	0.00	0.00	1.14	2.87	0.60	3.89		8.50
Littlehampton	0.17	1.11	0.00	4.35	1.05	161.51	0.52		168.71
Midhurst	0.00	0.00	0.00	0.00	8.53	0.00	2.33		10.86
Petersfield/Liss	0.00	0.00	0.00	0.00	18.10	0.00	1.55		19.66
Portsmouth	0.26	4.59	0.00	0.57	0.29	2.01	11.40		19.11
Worthing	0.00	0.00	0.00	0.00	0.00	13.64	0.00		13.64
Other	0.26	0.32	0.00	0.00	37.93	6.62	3.11		48.24
<b>Other Total</b>	<b>2.00</b>	<b>93.15</b>	<b>5.89</b>	<b>169.17</b>	<b>76.54</b>	<b>189.40</b>	<b>253.93</b>		<b>790.06</b>
<b>TOTAL</b>	<b>86.83</b>	<b>158.15</b>	<b>94.95</b>	<b>189.22</b>	<b>95.79</b>	<b>200.63</b>	<b>259.11</b>	<b>11.82</b>	<b>1,096.52</b>

Source: Tables 2A and 3



Table 5A - Future 2026 convenience goods expenditure patterns (£M) -baseline growth

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>88.65</b>	<b>161.47</b>	<b>96.96</b>	<b>193.59</b>	<b>97.87</b>	<b>205.85</b>	<b>263.99</b>		<b>1,108.38</b>
Aldi, Barnfield Drive, Chichester	6.47	6.14	4.75	2.32	3.33	0.62	0.00	0.98	24.61
Lidl, Portfield Way, Chichester	5.58	2.10	3.39	1.16	1.47	0.00	0.00	0.57	14.28
Sainsbury's, Westhampnett Road, Chichester	17.64	15.18	15.71	2.90	6.46	2.88	0.00	2.53	63.30
Tesco Extra, Fishbourne Road East, Chichester	24.73	11.14	18.81	2.32	5.28	0.62	3.96	2.79	69.66
Waitrose, Via Ravenna, Chichester	9.66	8.40	4.75	1.74	0.69	5.56	0.00	1.62	32.42
Other Chichester	21.45	10.98	4.36	8.91	2.15	1.85	1.32	2.13	53.15
Asda, Selsey	0.00	0.32	12.22	0.00	0.00	0.00	0.00	0.39	12.93
Selsey	0.00	0.00	12.90	0.00	0.00	0.00	0.00	0.33	13.23
East Wittering/Bracklesham	0.53	0.00	11.63	0.00	0.00	0.00	0.00	0.31	12.48
Chichester rural	0.53	12.11	2.42	1.16	0.29	0.00	0.00	0.42	16.95
<b>Chichester District Total</b>	<b>86.61</b>	<b>66.37</b>	<b>90.95</b>	<b>20.52</b>	<b>19.67</b>	<b>11.53</b>	<b>5.28</b>	<b>12.07</b>	<b>312.99</b>
Bognor Regis	0.44	0.81	5.62	166.30	1.57	4.53	0.00		179.26
Haslemere	0.00	0.00	0.00	0.00	4.40	0.21	0.53		5.14
Havant/Waterlooville	0.89	88.16	0.39	0.58	1.96	0.41	234.95		327.34
Horsham	0.00	0.00	0.00	1.16	2.94	0.62	3.96		8.67
Littlehampton	0.18	1.13	0.00	4.45	1.08	165.71	0.53		173.07
Midhurst	0.00	0.00	0.00	0.00	8.71	0.00	2.38		11.09
Petersfield/Liss	0.00	0.00	0.00	0.00	18.50	0.00	1.58		20.08
Portsmouth	0.27	4.68	0.00	0.58	0.29	2.06	11.62		19.50
Worthing	0.00	0.00	0.00	0.00	0.00	14.00	0.00		14.00
Other	0.27	0.32	0.00	0.00	38.75	6.79	3.17		49.30
<b>Other Total</b>	<b>2.04</b>	<b>95.11</b>	<b>6.01</b>	<b>173.07</b>	<b>78.19</b>	<b>194.32</b>	<b>258.71</b>		<b>807.46</b>
<b>TOTAL</b>	<b>88.65</b>	<b>161.47</b>	<b>96.96</b>	<b>193.59</b>	<b>97.87</b>	<b>205.85</b>	<b>263.99</b>	<b>12.07</b>	<b>1,120.45</b>

Table 5B - Future 2026 convenience goods expenditure patterns (£M) - high growth

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>89.10</b>	<b>162.31</b>	<b>97.46</b>	<b>193.59</b>	<b>97.87</b>	<b>205.85</b>	<b>263.99</b>		<b>1,110.17</b>
Aldi, Barnfield Drive, Chichester	6.50	6.17	4.78	2.32	3.33	0.62	0.00	0.99	24.70
Lidl, Portfield Way, Chichester	5.61	2.11	3.41	1.16	1.47	0.00	0.00	0.57	14.34
Sainsbury's, Westhampnett Road, Chichester	17.73	15.26	15.79	2.90	6.46	2.88	0.00	2.54	63.56
Tesco Extra, Fishbourne Road East, Chichester	24.86	11.20	18.91	2.32	5.28	0.62	3.96	2.80	69.95
Waitrose, Via Ravenna, Chichester	9.71	8.44	4.78	1.74	0.69	5.56	0.00	1.63	32.54
Other Chichester	21.56	11.04	4.39	8.91	2.15	1.85	1.32	2.13	53.35
Asda, Selsey	0.00	0.32	12.28	0.00	0.00	0.00	0.00	0.39	12.99
Selsey	0.00	0.00	12.96	0.00	0.00	0.00	0.00	0.33	13.29
East Wittering/Bracklesham	0.53	0.00	11.69	0.00	0.00	0.00	0.00	0.31	12.54
Chichester rural	0.53	12.17	2.44	1.16	0.29	0.00	0.00	0.43	17.02
<b>Chichester District Total</b>	<b>87.05</b>	<b>66.71</b>	<b>91.42</b>	<b>20.52</b>	<b>19.67</b>	<b>11.53</b>	<b>5.28</b>	<b>12.12</b>	<b>314.30</b>
Bognor Regis	0.45	0.81	5.65	166.30	1.57	4.53	0.00		179.30
Haslemere	0.00	0.00	0.00	0.00	4.40	0.21	0.53		5.14
Havant/Waterlooville	0.89	88.62	0.39	0.58	1.96	0.41	234.95		327.80
Horsham	0.00	0.00	0.00	1.16	2.94	0.62	3.96		8.67
Littlehampton	0.18	1.14	0.00	4.45	1.08	165.71	0.53		173.08
Midhurst	0.00	0.00	0.00	0.00	8.71	0.00	2.38		11.09
Petersfield/Liss	0.00	0.00	0.00	0.00	18.50	0.00	1.58		20.08
Portsmouth	0.27	4.71	0.00	0.58	0.29	2.06	11.62		19.52
Worthing	0.00	0.00	0.00	0.00	0.00	14.00	0.00		14.00
Other	0.27	0.32	0.00	0.00	38.75	6.79	3.17		49.31
<b>Other Total</b>	<b>2.05</b>	<b>95.60</b>	<b>6.04</b>	<b>173.07</b>	<b>78.19</b>	<b>194.32</b>	<b>258.71</b>		<b>807.99</b>
<b>TOTAL</b>	<b>89.10</b>	<b>162.31</b>	<b>97.46</b>	<b>193.59</b>	<b>97.87</b>	<b>205.85</b>	<b>263.99</b>	<b>12.12</b>	<b>1,122.29</b>

Source: Tables 2A/2B and 3

**Table 6A - Future 2031 convenience goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>91.50</b>	<b>166.67</b>	<b>100.08</b>	<b>199.76</b>	<b>100.74</b>	<b>213.12</b>	<b>271.32</b>		<b>1,143.20</b>
Aldi, Barnfield Drive, Chichester	6.68	6.33	4.90	2.40	3.43	0.64	0.00	1.02	25.39
Lidl, Portfield Way, Chichester	5.76	2.17	3.50	1.20	1.51	0.00	0.00	0.59	14.73
Sainsbury's, Westhampnett Road, Chichester	18.21	15.67	16.21	3.00	6.65	2.98	0.00	2.61	65.33
Tesco Extra, Fishbourne Road East, Chichester	25.53	11.50	19.42	2.40	5.44	0.64	4.07	2.87	71.87
Waitrose, Via Ravenna, Chichester	9.97	8.67	4.90	1.80	0.71	5.75	0.00	1.67	33.48
Other Chichester	22.14	11.33	4.50	9.19	2.22	1.92	1.36	2.19	54.85
Asda, Selsey	0.00	0.33	12.61	0.00	0.00	0.00	0.00	0.40	13.34
Selsey	0.00	0.00	13.31	0.00	0.00	0.00	0.00	0.34	13.65
East Wittering/Bracklesham	0.55	0.00	12.01	0.00	0.00	0.00	0.00	0.32	12.88
Chichester rural	0.55	12.50	2.50	1.20	0.30	0.00	0.00	0.44	17.49
<b>Chichester District Total</b>	<b>89.40</b>	<b>68.50</b>	<b>93.88</b>	<b>21.17</b>	<b>20.25</b>	<b>11.93</b>	<b>5.43</b>	<b>12.46</b>	<b>323.02</b>
Bognor Regis	0.46	0.83	5.80	171.60	1.61	4.69	0.00		184.99
Haslemere	0.00	0.00	0.00	0.00	4.53	0.21	0.54		5.29
Havant/Waterlooville	0.92	91.00	0.40	0.60	2.01	0.43	241.48		336.84
Horsham	0.00	0.00	0.00	1.20	3.02	0.64	4.07		8.93
Littlehampton	0.18	1.17	0.00	4.59	1.11	171.56	0.54		179.16
Midhurst	0.00	0.00	0.00	0.00	8.97	0.00	2.44		11.41
Petersfield/Liss	0.00	0.00	0.00	0.00	19.04	0.00	1.63		20.67
Portsmouth	0.27	4.83	0.00	0.60	0.30	2.13	11.94		20.08
Worthing	0.00	0.00	0.00	0.00	0.00	14.49	0.00		14.49
Other	0.27	0.33	0.00	0.00	39.89	7.03	3.26		50.79
<b>Other Total</b>	<b>2.10</b>	<b>98.17</b>	<b>6.20</b>	<b>178.59</b>	<b>80.50</b>	<b>201.19</b>	<b>265.90</b>		<b>832.65</b>
<b>TOTAL</b>	<b>91.50</b>	<b>166.67</b>	<b>100.08</b>	<b>199.76</b>	<b>100.74</b>	<b>213.12</b>	<b>271.32</b>	<b>12.46</b>	<b>1,155.67</b>

**Table 6B - Future 2031 convenience goods expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>92.57</b>	<b>168.62</b>	<b>101.25</b>	<b>199.76</b>	<b>100.74</b>	<b>213.12</b>	<b>271.32</b>		<b>1,147.39</b>
Aldi, Barnfield Drive, Chichester	6.76	6.41	4.96	2.40	3.43	0.64	0.00	1.02	25.61
Lidl, Portfield Way, Chichester	5.83	2.19	3.54	1.20	1.51	0.00	0.00	0.59	14.87
Sainsbury's, Westhampnett Road, Chichester	18.42	15.85	16.40	3.00	6.65	2.98	0.00	2.64	65.94
Tesco Extra, Fishbourne Road East, Chichester	25.83	11.63	19.64	2.40	5.44	0.64	4.07	2.90	72.55
Waitrose, Via Ravenna, Chichester	10.09	8.77	4.96	1.80	0.71	5.75	0.00	1.69	33.76
Other Chichester	22.40	11.47	4.56	9.19	2.22	1.92	1.36	2.21	55.32
Asda, Selsey	0.00	0.34	12.76	0.00	0.00	0.00	0.00	0.40	13.50
Selsey	0.00	0.00	13.47	0.00	0.00	0.00	0.00	0.35	13.81
East Wittering/Bracklesham	0.56	0.00	12.15	0.00	0.00	0.00	0.00	0.33	13.03
Chichester rural	0.56	12.65	2.53	1.20	0.30	0.00	0.00	0.44	17.68
<b>Chichester District Total</b>	<b>90.44</b>	<b>69.30</b>	<b>94.97</b>	<b>21.17</b>	<b>20.25</b>	<b>11.93</b>	<b>5.43</b>	<b>12.58</b>	<b>326.08</b>
Bognor Regis	0.46	0.84	5.87	171.60	1.61	4.69	0.00		185.07
Haslemere	0.00	0.00	0.00	0.00	4.53	0.21	0.54		5.29
Havant/Waterlooville	0.93	92.07	0.40	0.60	2.01	0.43	241.48		337.91
Horsham	0.00	0.00	0.00	1.20	3.02	0.64	4.07		8.93
Littlehampton	0.19	1.18	0.00	4.59	1.11	171.56	0.54		179.17
Midhurst	0.00	0.00	0.00	0.00	8.97	0.00	2.44		11.41
Petersfield/Liss	0.00	0.00	0.00	0.00	19.04	0.00	1.63		20.67
Portsmouth	0.28	4.89	0.00	0.60	0.30	2.13	11.94		20.14
Worthing	0.00	0.00	0.00	0.00	0.00	14.49	0.00		14.49
Other	0.28	0.34	0.00	0.00	39.89	7.03	3.26		50.80
<b>Other Total</b>	<b>2.13</b>	<b>99.32</b>	<b>6.28</b>	<b>178.59</b>	<b>80.50</b>	<b>201.19</b>	<b>265.90</b>		<b>833.89</b>
<b>TOTAL</b>	<b>92.57</b>	<b>168.62</b>	<b>101.25</b>	<b>199.76</b>	<b>100.74</b>	<b>213.12</b>	<b>271.32</b>	<b>12.58</b>	<b>1,159.97</b>

Source: Tables 2A/2B and 3

**Table 7A - Future 2035 convenience goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>93.85</b>	<b>170.95</b>	<b>102.65</b>	<b>204.63</b>	<b>102.85</b>	<b>218.75</b>	<b>277.44</b>		<b>1,171.11</b>
Aldi, Barnfield Drive, Chichester	6.85	6.50	5.03	2.46	3.50	0.66	0.00	1.04	26.03
Lidl, Portfield Way, Chichester	5.91	2.22	3.59	1.23	1.54	0.00	0.00	0.60	15.10
Sainsbury's, Westhampnett Road, Chichester	18.68	16.07	16.63	3.07	6.79	3.06	0.00	2.68	66.97
Tesco Extra, Fishbourne Road East, Chichester	26.18	11.80	19.91	2.46	5.55	0.66	4.16	2.95	73.67
Waitrose, Via Ravenna, Chichester	10.23	8.89	5.03	1.84	0.72	5.91	0.00	1.72	34.33
Other Chichester	22.71	11.62	4.62	9.41	2.26	1.97	1.39	2.25	56.24
Asda, Selsey	0.00	0.34	12.93	0.00	0.00	0.00	0.00	0.41	13.69
Selsey	0.00	0.00	13.65	0.00	0.00	0.00	0.00	0.35	14.00
East Wittering/Bracklesham	0.56	0.00	12.32	0.00	0.00	0.00	0.00	0.33	13.21
Chichester rural	0.56	12.82	2.57	1.23	0.31	0.00	0.00	0.45	17.93
<b>Chichester District Total</b>	<b>91.69</b>	<b>70.26</b>	<b>96.28</b>	<b>21.69</b>	<b>20.67</b>	<b>12.25</b>	<b>5.55</b>	<b>12.78</b>	<b>331.17</b>
Bognor Regis	0.47	0.85	5.95	175.78	1.65	4.81	0.00		189.51
Haslemere	0.00	0.00	0.00	0.00	4.63	0.22	0.55		5.40
Havant/Waterlooville	0.94	93.34	0.41	0.61	2.06	0.44	246.92		344.72
Horsham	0.00	0.00	0.00	1.23	3.09	0.66	4.16		9.13
Littlehampton	0.19	1.20	0.00	4.71	1.13	176.09	0.55		183.87
Midhurst	0.00	0.00	0.00	0.00	9.15	0.00	2.50		11.65
Petersfield/Liss	0.00	0.00	0.00	0.00	19.44	0.00	1.66		21.10
Portsmouth	0.28	4.96	0.00	0.61	0.31	2.19	12.21		20.56
Worthing	0.00	0.00	0.00	0.00	0.00	14.87	0.00		14.87
Other	0.28	0.34	0.00	0.00	40.73	7.22	3.33		51.90
<b>Other Total</b>	<b>2.16</b>	<b>100.69</b>	<b>6.36</b>	<b>182.94</b>	<b>82.18</b>	<b>206.50</b>	<b>271.89</b>		<b>852.72</b>
<b>TOTAL</b>	<b>93.85</b>	<b>170.95</b>	<b>102.65</b>	<b>204.63</b>	<b>102.85</b>	<b>218.75</b>	<b>277.44</b>	<b>12.78</b>	<b>1,183.89</b>

Table 7B - Future 2035 convenience goods expenditure patterns (£M) - high growth

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>95.45</b>	<b>173.86</b>	<b>104.39</b>	<b>204.63</b>	<b>102.85</b>	<b>218.75</b>	<b>277.44</b>		<b>1,177.37</b>
Aldi, Barnfield Drive, Chichester	6.97	6.61	5.12	2.46	3.50	0.66	0.00	1.05	26.35
Lidl, Portfield Way, Chichester	6.01	2.26	3.65	1.23	1.54	0.00	0.00	0.61	15.31
Sainsbury's, Westhampnett Road, Chichester	18.99	16.34	16.91	3.07	6.79	3.06	0.00	2.72	67.88
Tesco Extra, Fishbourne Road East, Chichester	26.63	12.00	20.25	2.46	5.55	0.66	4.16	2.99	74.69
Waitrose, Via Ravenna, Chichester	10.40	9.04	5.12	1.84	0.72	5.91	0.00	1.74	34.77
Other Chichester	23.10	11.82	4.70	9.41	2.26	1.97	1.39	2.28	56.93
Asda, Selsey	0.00	0.35	13.15	0.00	0.00	0.00	0.00	0.42	13.92
Selsey	0.00	0.00	13.88	0.00	0.00	0.00	0.00	0.36	14.24
East Wittering/Bracklesham	0.57	0.00	12.53	0.00	0.00	0.00	0.00	0.34	13.44
Chichester rural	0.57	13.04	2.61	1.23	0.31	0.00	0.00	0.46	18.21
<b>Chichester District Total</b>	<b>93.25</b>	<b>71.46</b>	<b>97.92</b>	<b>21.69</b>	<b>20.67</b>	<b>12.25</b>	<b>5.55</b>	<b>12.95</b>	<b>335.74</b>
Bognor Regis	0.48	0.87	6.05	175.78	1.65	4.81	0.00		189.64
Haslemere	0.00	0.00	0.00	0.00	4.63	0.22	0.55		5.40
Havant/Waterlooville	0.95	94.93	0.42	0.61	2.06	0.44	246.92		346.33
Horsham	0.00	0.00	0.00	1.23	3.09	0.66	4.16		9.13
Littlehampton	0.19	1.22	0.00	4.71	1.13	176.09	0.55		183.89
Midhurst	0.00	0.00	0.00	0.00	9.15	0.00	2.50		11.65
Petersfield/Liss	0.00	0.00	0.00	0.00	19.44	0.00	1.66		21.10
Portsmouth	0.29	5.04	0.00	0.61	0.31	2.19	12.21		20.65
Worthing	0.00	0.00	0.00	0.00	0.00	14.87	0.00		14.87
Other	0.29	0.35	0.00	0.00	40.73	7.22	3.33		51.91
<b>Other Total</b>	<b>2.20</b>	<b>102.40</b>	<b>6.47</b>	<b>182.94</b>	<b>82.18</b>	<b>206.50</b>	<b>271.89</b>		<b>854.58</b>
<b>TOTAL</b>	<b>95.45</b>	<b>173.86</b>	<b>104.39</b>	<b>204.63</b>	<b>102.85</b>	<b>218.75</b>	<b>277.44</b>	<b>12.95</b>	<b>1,190.32</b>

Source: Tables 2A/2B and 3

**Table 8A - Future 2039 convenience goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>95.99</b>	<b>174.90</b>	<b>105.03</b>	<b>208.85</b>	<b>104.66</b>	<b>223.88</b>	<b>283.26</b>		<b>1,196.56</b>
Aldi, Barnfield Drive, Chichester	7.01	6.65	5.15	2.51	3.56	0.67	0.00	1.06	26.60
Lidl, Portfield Way, Chichester	6.05	2.27	3.68	1.25	1.57	0.00	0.00	0.62	15.44
Sainsbury's, Westhampnett Road, Chichester	19.10	16.44	17.01	3.13	6.91	3.13	0.00	2.74	68.47
Tesco Extra, Fishbourne Road East, Chichester	26.78	12.07	20.38	2.51	5.65	0.67	4.25	3.01	75.32
Waitrose, Via Ravenna, Chichester	10.46	9.09	5.15	1.88	0.73	6.04	0.00	1.76	35.12
Other Chichester	23.23	11.89	4.73	9.61	2.30	2.01	1.42	2.30	57.49
Asda, Selsey	0.00	0.35	13.23	0.00	0.00	0.00	0.00	0.42	14.00
Selsey	0.00	0.00	13.97	0.00	0.00	0.00	0.00	0.36	14.33
East Wittering/Bracklesham	0.58	0.00	12.60	0.00	0.00	0.00	0.00	0.34	13.52
Chichester rural	0.58	13.12	2.63	1.25	0.31	0.00	0.00	0.46	18.34
<b>Chichester District Total</b>	<b>93.78</b>	<b>71.88</b>	<b>98.52</b>	<b>22.14</b>	<b>21.04</b>	<b>12.54</b>	<b>5.67</b>	<b>13.06</b>	<b>338.62</b>
Bognor Regis	0.48	0.87	6.09	179.40	1.67	4.93	0.00		193.44
Haslemere	0.00	0.00	0.00	0.00	4.71	0.22	0.57		5.50
Havant/Waterlooville	0.96	95.49	0.42	0.63	2.09	0.45	252.10		352.14
Horsham	0.00	0.00	0.00	1.25	3.14	0.67	4.25		9.31
Littlehampton	0.19	1.22	0.00	4.80	1.15	180.22	0.57		188.16
Midhurst	0.00	0.00	0.00	0.00	9.31	0.00	2.55		11.86
Petersfield/Liss	0.00	0.00	0.00	0.00	19.78	0.00	1.70		21.48
Portsmouth	0.29	5.07	0.00	0.63	0.31	2.24	12.46		21.00
Worthing	0.00	0.00	0.00	0.00	0.00	15.22	0.00		15.22
Other	0.29	0.35	0.00	0.00	41.45	7.39	3.40		52.87
<b>Other Total</b>	<b>2.21</b>	<b>103.01</b>	<b>6.51</b>	<b>186.71</b>	<b>83.63</b>	<b>211.34</b>	<b>277.59</b>		<b>871.00</b>
<b>TOTAL</b>	<b>95.99</b>	<b>174.90</b>	<b>105.03</b>	<b>208.85</b>	<b>104.66</b>	<b>223.88</b>	<b>283.26</b>	<b>13.06</b>	<b>1,209.63</b>

Table 8B - Future 2039 convenience goods expenditure patterns (£M) - high growth

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>98.14</b>	<b>178.81</b>	<b>107.38</b>	<b>208.85</b>	<b>104.66</b>	<b>223.88</b>	<b>283.26</b>		<b>1,204.99</b>
Aldi, Barnfield Drive, Chichester	7.16	6.79	5.26	2.51	3.56	0.67	0.00	1.08	27.04
Lidl, Portfield Way, Chichester	6.18	2.32	3.76	1.25	1.57	0.00	0.00	0.63	15.72
Sainsbury's, Westhampnett Road, Chichester	19.53	16.81	17.40	3.13	6.91	3.13	0.00	2.79	69.70
Tesco Extra, Fishbourne Road East, Chichester	27.38	12.34	20.83	2.51	5.65	0.67	4.25	3.07	76.70
Waitrose, Via Ravenna, Chichester	10.70	9.30	5.26	1.88	0.73	6.04	0.00	1.78	35.70
Other Chichester	23.75	12.16	4.83	9.61	2.30	2.01	1.42	2.34	58.42
Asda, Selsey	0.00	0.36	13.53	0.00	0.00	0.00	0.00	0.43	14.32
Selsey	0.00	0.00	14.28	0.00	0.00	0.00	0.00	0.37	14.65
East Wittering/Bracklesham	0.59	0.00	12.89	0.00	0.00	0.00	0.00	0.35	13.82
Chichester rural	0.59	13.41	2.68	1.25	0.31	0.00	0.00	0.47	18.72
<b>Chichester District Total</b>	<b>95.89</b>	<b>73.49</b>	<b>100.72</b>	<b>22.14</b>	<b>21.04</b>	<b>12.54</b>	<b>5.67</b>	<b>13.30</b>	<b>344.78</b>
Bognor Regis	0.49	0.89	6.23	179.40	1.67	4.93	0.00		193.61
Haslemere	0.00	0.00	0.00	0.00	4.71	0.22	0.57		5.50
Havant/Waterlooville	0.98	97.63	0.43	0.63	2.09	0.45	252.10		354.31
Horsham	0.00	0.00	0.00	1.25	3.14	0.67	4.25		9.31
Littlehampton	0.20	1.25	0.00	4.80	1.15	180.22	0.57		188.19
Midhurst	0.00	0.00	0.00	0.00	9.31	0.00	2.55		11.86
Petersfield/Liss	0.00	0.00	0.00	0.00	19.78	0.00	1.70		21.48
Portsmouth	0.29	5.19	0.00	0.63	0.31	2.24	12.46		21.12
Worthing	0.00	0.00	0.00	0.00	0.00	15.22	0.00		15.22
Other	0.29	0.36	0.00	0.00	41.45	7.39	3.40		52.89
<b>Other Total</b>	<b>2.26</b>	<b>105.32</b>	<b>6.66</b>	<b>186.71</b>	<b>83.63</b>	<b>211.34</b>	<b>277.59</b>		<b>873.51</b>
<b>TOTAL</b>	<b>98.14</b>	<b>178.81</b>	<b>107.38</b>	<b>208.85</b>	<b>104.66</b>	<b>223.88</b>	<b>283.26</b>	<b>13.30</b>	<b>1,218.28</b>

Source: Tables 2A/2B and 3



Table 9A - Convenience goods floorspace in Chichester main settlements (2020 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
<b>Chichester</b>					
Aldi, Barnfield Drive	1,198	85%	1,018	£11,199	£11.40
Lidl, Portfield Way	1,113	85%	946	£8,883	£8.40
Sainsbury's, Westhampnett Road	6,381	65%	4,148	£12,685	£52.61
Tesco Extra, Fishbourne Road East	6,667	65%	4,334	£14,304	£61.99
Waitrose, Via Ravenna	2,176	90%	1,958	£14,980	£29.34
Co-op East Street	265	95%	252	£11,169	£2.81
Co-op, Bognor Road	257	95%	244	£11,169	£2.73
Co-op, Oliver Whitby Road	199	95%	189	£11,169	£2.11
Co-op, Spitalfield Lane	219	95%	208	£11,169	£2.32
Co-op, Stockbridge Road	242	95%	230	£11,169	£2.57
Iceland Warehouse, Barnfield Drive	628	98%	615	£7,568	£4.66
Iceland, South Street	428	98%	419	£7,568	£3.17
M&S Foodhall, East Street	836	95%	794	£11,275	£8.95
M&S Dept store, North Street	837	195%	1,632	£11,275	£18.40
M&S Foodhall, Portfield Retail Park	651	95%	618	£11,275	£6.97
Tesco Express, South Street	220	95%	209	£14,304	£2.99
Tesco Express, St James Road	119	95%	113	£14,304	£1.62
Other Chichester town centre	2,100	100%	2,100	n/a	n/a
	<b>24,536</b>		<b>20,029</b>		<b>£223.05</b>
<b>Selsey</b>					
Asda, Wave Approach	1,350	75%	1,013	£14,480	£14.66
Co-op, High Street	698	95%	663	£11,169	£7.41
Co-op, 123-125 High Street	317	95%	301	£11,169	£3.36
Other Selsey	575	100%	575	n/a	n/a
	<b>2,940</b>		<b>2,552</b>		<b>£25.43</b>
<b>East Wittering/Bracklesham</b>					
Co-op, The Parade, Cakeham Road	328	95%	312	£11,169	£3.48
Tesco Express, Kingfisher Parade	242	95%	230	£14,304	£3.29
Other East Wittering/Bracklesham	480	100%	480	n/a	n/a
	<b>1,050</b>		<b>1,022</b>		<b>£6.77</b>
<b>TOTAL</b>	<b>28,526</b>		<b>23,602</b>		<b>£255.25</b>

Table 9B - Other Convenience Goods Floorspace in Chichester District (2020 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
<b>Tangmere</b>					
Co-op, Malcolm Road	196	95%	186	£11,169	£2.08
One Stop	150	100%	150	n/a	n/a
	<b>346</b>		<b>336</b>		<b>£2.08</b>
<b>Southbourne</b>					
Co-op, Main Road	229	95%	218	£11,169	£2.43
Tesco Express, Stein Road	135	95%	128	£14,304	£1.83
Other Southbourne	200	100%	200	n/a	n/a
	<b>564</b>		<b>546</b>		<b>£4.26</b>
<b>Other Chichester District</b>					
Co-op, Delling Lane, Bosham	335	95%	318	£11,169	£3.55
Co-op, Station Road, Bosham	77	95%	73	£11,169	£0.82
Co-op, The Square, Westbourne	335	95%	318	£11,169	£3.55
	<b>747</b>		<b>710</b>		<b>£7.93</b>
<b>TOTAL</b>	<b>1,657</b>		<b>1,592</b>		<b>£14.27</b>

Source: Lichfields' survey, VOA, Experian Goad Plan May 2017, ORC Storepoint 2021 and Global Data 2021

**Table 10A - Summary of convenience goods expenditure 2022 to 2039 (£M) - baseline growth**

	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester	252.03	257.42	265.66	272.34	278.43
Selsey	25.61	26.15	27.00	27.69	28.33
East Wittering/Bracklesham	12.22	12.48	12.88	13.21	13.52
Chichester rural	16.59	16.95	17.49	17.93	18.34
<b>Total</b>	<b>306.45</b>	<b>312.99</b>	<b>323.02</b>	<b>331.17</b>	<b>338.62</b>
<b>Turnover of existing facilities</b>					
Chichester	252.03	263.50	264.29	264.29	264.29
Selsey	25.61	26.78	26.86	26.86	26.86
East Wittering/Bracklesham	12.22	12.78	12.82	12.82	12.82
Chichester rural	16.59	17.35	17.40	17.40	17.40
<b>Total</b>	<b>306.45</b>	<b>320.40</b>	<b>321.36</b>	<b>321.36</b>	<b>321.36</b>
<b>Surplus/deficit expenditure £M</b>					
Chichester	0.00	-6.08	1.37	8.05	14.14
Selsey	0.00	-0.63	0.14	0.83	1.47
East Wittering/Bracklesham	0.00	-0.30	0.06	0.40	0.70
Chichester rural	0.00	-0.40	0.09	0.53	0.94
<b>Total</b>	<b>0.00</b>	<b>-7.41</b>	<b>1.66</b>	<b>9.81</b>	<b>17.26</b>

**Table 10B - Summary of convenience goods expenditure 2022 to 2039 (£M) - high growth**

	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester	252.03	258.45	268.06	275.93	283.27
Selsey	25.61	26.29	27.31	28.16	28.97
East Wittering/Bracklesham	12.22	12.54	13.03	13.44	13.82
Chichester rural	16.59	17.02	17.68	18.21	18.72
<b>Total</b>	<b>306.45</b>	<b>314.30</b>	<b>326.08</b>	<b>335.74</b>	<b>344.78</b>
<b>Turnover of existing facilities</b>					
Chichester	252.03	263.50	264.29	264.29	264.29
Selsey	25.61	26.78	26.86	26.86	26.86
East Wittering/Bracklesham	12.22	12.78	12.82	12.82	12.82
Chichester rural	16.59	17.35	17.40	17.40	17.40
<b>Total</b>	<b>306.45</b>	<b>320.40</b>	<b>321.36</b>	<b>321.36</b>	<b>321.36</b>
<b>Surplus/deficit expenditure £M</b>					
Chichester	0.00	-5.05	3.77	11.64	18.98
Selsey	0.00	-0.49	0.45	1.30	2.11
East Wittering/Bracklesham	0.00	-0.23	0.22	0.62	1.00
Chichester rural	0.00	-0.32	0.27	0.81	1.32
<b>Total</b>	<b>0.00</b>	<b>-6.10</b>	<b>4.71</b>	<b>14.37</b>	<b>23.41</b>

Source: Tables 4 to 9B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a

**Table 11A - Convenience goods floorspace capacity (baseline growth)**

	2022	2026	2031	2035	2039
<b>Turnover density new floorspace (£ per sq.m)</b>	£12,000	£12,546	£12,584	£12,584	£12,584
<b>Sales floorspace projection (sq.m net)</b>					
Chichester	0	-485	109	639	1,124
Selsey	0	-50	11	66	117
East Wittering/Bracklesham	0	-24	5	31	56
Chichester rural	0	-32	7	42	75
	<b>0</b>	<b>-590</b>	<b>132</b>	<b>779</b>	<b>1,372</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Chichester	0	-692	155	914	1,606
Selsey	0	-71	15	94	167
East Wittering/Bracklesham	0	-34	7	45	80
Chichester rural	0	-46	10	61	107
	<b>0</b>	<b>-844</b>	<b>188</b>	<b>1,113</b>	<b>1,959</b>

**Table 11B - Convenience goods floorspace capacity (high growth)**

	2022	2026	2031	2035	2039
<b>Turnover density new floorspace (£ per sq.m)</b>	£12,000	£12,546	£12,584	£12,584	£12,584
<b>Sales floorspace projection (sq.m net)</b>					
Chichester	0	-403	300	925	1,509
Selsey	0	-39	36	103	167
East Wittering/Bracklesham	0	-19	17	49	80
Chichester rural	0	-26	22	65	105
	<b>0</b>	<b>-486</b>	<b>375</b>	<b>1,142</b>	<b>1,861</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Chichester	0	-575	428	1,322	2,155
Selsey	0	-56	51	148	239
East Wittering/Bracklesham	0	-27	24	70	114
Chichester rural	0	-37	31	92	150
	<b>0</b>	<b>-695</b>	<b>535</b>	<b>1,632</b>	<b>2,658</b>

Source: Table 10A and 10B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a.



## **Appendix 3 Comparison goods capacity**

**Table 1 - Comparison goods expenditure per person per annum (£)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	3,254	3,500	3,926	4,346	4,838
Zone 2 - Hayling Island/South Downs/Southbourne	3,910	4,206	4,718	5,223	5,814
Zone 3 - Selsey/East Wittering/Bracklesham	3,583	3,855	4,323	4,786	5,328
Zone 4 - Bognor Regis	3,214	3,457	3,877	4,292	4,778
Zone 5 - South Downs (North)	4,165	4,480	5,024	5,562	6,192
Zone 6 - Arundel/Littlehampton	3,417	3,676	4,123	4,564	5,080
Zone 7 - Waterlooville/Havant	3,219	3,463	3,884	4,300	4,786

Sources:

*Experian Local Expenditure 2020 (2020 prices)**Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a**Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5***Table 2A - Total comparison goods expenditure (£m) - baseline growth**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	110.50	122.17	141.49	160.35	182.48
Zone 2 - Hayling Island/South Downs/Southbourne	221.79	245.24	284.01	321.88	366.30
Zone 3 - Selsey/East Wittering/Bracklesham	127.66	141.16	163.48	185.27	210.85
Zone 4 - Bognor Regis	242.59	268.74	311.13	352.17	399.78
Zone 5 - South Downs (North)	134.20	148.44	171.45	193.40	218.94
Zone 6 - Arundel/Littlehampton	266.34	295.97	343.80	389.92	443.92
Zone 7 - Waterlooville/Havant	341.42	376.72	434.42	490.85	557.43
<b>Study Area Total</b>	<b>1,444.50</b>	<b>1,598.43</b>	<b>1,849.78</b>	<b>2,093.84</b>	<b>2,379.70</b>

Source: Table 1A, Appendix 1 and Table1, Appendix 3

**Table 2B - Total comparison goods expenditure (£m) - high growth**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	110.50	122.80	143.14	163.08	186.57
Zone 2 - Hayling Island/South Downs/Southbourne	221.79	246.50	287.33	327.35	374.51
Zone 3 - Selsey/East Wittering/Bracklesham	127.66	141.89	165.39	188.43	215.57
Zone 4 - Bognor Regis	242.59	268.74	311.13	352.17	399.78
Zone 5 - South Downs (North)	134.20	148.44	171.45	193.40	218.94
Zone 6 - Arundel/Littlehampton	266.34	295.97	343.80	389.92	443.92
Zone 7 - Waterlooville/Havant	341.42	376.72	434.42	490.85	557.43
<b>Study Area Total</b>	<b>1,444.50</b>	<b>1,601.05</b>	<b>1,856.65</b>	<b>2,105.20</b>	<b>2,396.72</b>

Source: Tables 1B, Appendix 1 and 1, Appendix 3

**Table 3 - Base year 2022 comparison goods market shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Chichester town centre	62.3%	37.1%	47.9%	34.6%	17.3%	17.5%	9.9%	6.0%
Chichester other	22.3%	10.7%	17.9%	3.3%	8.7%	5.0%	1.4%	0.5%
Selsey	0.3%	0.0%	10.2%	0.1%	0.0%	0.0%	0.6%	0.5%
East Wittering/Bracklesham	0.2%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Chichester rural	0.2%	0.5%	0.5%	0.0%	0.0%	0.0%	0.1%	0.5%
<b>Chichester District Total</b>	<b>85.3%</b>	<b>48.3%</b>	<b>80.5%</b>	<b>38.0%</b>	<b>26.0%</b>	<b>22.5%</b>	<b>12.0%</b>	n/a
Bognor Regis	2.8%	1.2%	5.9%	42.5%	1.3%	5.9%	0.1%	n/a
Havant/Waterlooville	1.0%	28.4%	1.4%	0.6%	2.4%	0.1%	58.7%	n/a
Horsham	0.0%	0.0%	0.0%	0.2%	13.3%	0.1%	0.0%	n/a
Littlehampton	0.0%	0.3%	0.1%	1.6%	0.9%	37.1%	0.0%	n/a
Midhurst	0.0%	0.6%	0.0%	0.0%	4.6%	0.0%	0.0%	n/a
Portsmouth	5.3%	14.3%	6.7%	4.8%	3.9%	0.7%	20.3%	n/a
Worthing	0.9%	0.4%	0.2%	0.8%	2.7%	25.4%	0.1%	n/a
Other	4.7%	6.5%	5.2%	11.5%	44.9%	8.2%	8.8%	n/a
<b>Other Total</b>	<b>14.7%</b>	<b>51.7%</b>	<b>19.5%</b>	<b>62.0%</b>	<b>74.0%</b>	<b>77.5%</b>	<b>88.0%</b>	n/a
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>n/a</b>

Source: NEMS Household Survey Jan. 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' estimates

**Table 4 - Base year 2022 comparison goods expenditure patterns (£M)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2022</b>	<b>110.50</b>	<b>221.79</b>	<b>127.66</b>	<b>242.59</b>	<b>134.20</b>	<b>266.34</b>	<b>341.42</b>		<b>1,444.50</b>
Chichester town centre	68.84	82.28	61.15	83.93	23.22	46.61	33.80	25.52	425.36
Chichester other	24.64	23.73	22.85	8.01	11.68	13.32	4.78	0.55	109.55
Selsey	0.33	0.00	13.02	0.24	0.00	0.00	2.05	0.08	15.72
East Wittering/Bracklesham	0.22	0.00	5.11	0.00	0.00	0.00	0.00	0.03	5.35
Chichester rural	0.22	1.11	0.64	0.00	0.00	0.00	0.34	0.01	2.32
<b>Chichester District Total</b>	<b>94.26</b>	<b>107.12</b>	<b>102.77</b>	<b>92.18</b>	<b>34.89</b>	<b>59.93</b>	<b>40.97</b>	<b>26.19</b>	<b>558.31</b>
Bognor Regis	3.09	2.66	7.53	103.10	1.74	15.71	0.34		134.19
Havant/Waterlooville	1.11	62.99	1.79	1.46	3.22	0.27	200.41		271.24
Horsham	0.00	0.00	0.00	0.49	17.85	0.27	0.00		18.60
Littlehampton	0.00	0.67	0.13	3.88	1.21	98.81	0.00		104.69
Midhurst	0.00	1.33	0.00	0.00	6.17	0.00	0.00		7.50
Portsmouth	5.86	31.72	8.55	11.64	5.23	1.86	69.31		134.18
Worthing	0.99	0.89	0.26	1.94	3.62	67.65	0.34		75.69
Other	5.19	14.42	6.64	27.90	60.25	21.84	30.04		166.28
<b>Other Total</b>	<b>16.24</b>	<b>114.67</b>	<b>24.89</b>	<b>150.40</b>	<b>99.31</b>	<b>206.41</b>	<b>300.45</b>		<b>912.38</b>
<b>TOTAL</b>	<b>110.50</b>	<b>221.79</b>	<b>127.66</b>	<b>242.59</b>	<b>134.20</b>	<b>266.34</b>	<b>341.42</b>	<b>26.19</b>	<b>1,470.69</b>

Source: Tables 2A and 3

**Table 5A - Future 2026 comparison goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>122.17</b>	<b>245.24</b>	<b>141.16</b>	<b>268.74</b>	<b>148.44</b>	<b>295.97</b>	<b>376.72</b>		<b>1,598.43</b>
Chichester town centre	76.11	90.98	67.62	92.98	25.68	51.79	37.30	28.24	470.71
Chichester other	27.24	26.24	25.27	8.87	12.91	14.80	5.27	0.61	121.21
Selsey	0.37	0.00	14.40	0.27	0.00	0.00	2.26	0.09	17.38
East Wittering/Bracklesham	0.24	0.00	5.65	0.00	0.00	0.00	0.00	0.03	5.92
Chichester rural	0.24	1.23	0.71	0.00	0.00	0.00	0.38	0.01	2.57
<b>Chichester District Total</b>	<b>104.21</b>	<b>118.45</b>	<b>113.63</b>	<b>102.12</b>	<b>38.59</b>	<b>66.59</b>	<b>45.21</b>	<b>28.98</b>	<b>617.79</b>
Bognor Regis	3.42	2.94	8.33	114.21	1.93	17.46	0.38		148.67
Havant/Waterlooville	1.22	69.65	1.98	1.61	3.56	0.30	221.14		299.45
Horsham	0.00	0.00	0.00	0.54	19.74	0.30	0.00		20.58
Littlehampton	0.00	0.74	0.14	4.30	1.34	109.80	0.00		116.32
Midhurst	0.00	1.47	0.00	0.00	6.83	0.00	0.00		8.30
Portsmouth	6.48	35.07	9.46	12.90	5.79	2.07	76.47		148.24
Worthing	1.10	0.98	0.28	2.15	4.01	75.18	0.38		84.07
Other	5.74	15.94	7.34	30.90	66.65	24.27	33.15		184.00
<b>Other Total</b>	<b>17.96</b>	<b>126.79</b>	<b>27.53</b>	<b>166.62</b>	<b>109.84</b>	<b>229.37</b>	<b>331.52</b>		<b>1,009.62</b>
<b>TOTAL</b>	<b>122.17</b>	<b>245.24</b>	<b>141.16</b>	<b>268.74</b>	<b>148.44</b>	<b>295.97</b>	<b>376.72</b>	<b>28.98</b>	<b>1,627.41</b>

**Table 5B - Future 2026 comparison goods expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>122.80</b>	<b>246.50</b>	<b>141.89</b>	<b>268.74</b>	<b>148.44</b>	<b>295.97</b>	<b>376.72</b>		<b>1,601.05</b>
Chichester town centre	76.51	91.45	67.96	92.98	25.68	51.79	37.30	28.32	471.99
Chichester other	27.39	26.38	25.40	8.87	12.91	14.80	5.27	0.61	121.62
Selsey	0.37	0.00	14.47	0.27	0.00	0.00	2.26	0.09	17.46
East Wittering/Bracklesham	0.25	0.00	5.68	0.00	0.00	0.00	0.00	0.03	5.95
Chichester rural	0.25	1.23	0.71	0.00	0.00	0.00	0.38	0.01	2.58
<b>Chichester District Total</b>	<b>104.75</b>	<b>119.06</b>	<b>114.22</b>	<b>102.12</b>	<b>38.59</b>	<b>66.59</b>	<b>45.21</b>	<b>29.06</b>	<b>619.60</b>
Bognor Regis	3.44	2.96	8.37	114.21	1.93	17.46	0.38		148.75
Havant/Waterlooville	1.23	70.01	1.99	1.61	3.56	0.30	221.14		299.83
Horsham	0.00	0.00	0.00	0.54	19.74	0.30	0.00		20.58
Littlehampton	0.00	0.74	0.14	4.30	1.34	109.80	0.00		116.32
Midhurst	0.00	1.48	0.00	0.00	6.83	0.00	0.00		8.31
Portsmouth	6.51	35.25	9.51	12.90	5.79	2.07	76.47		148.50
Worthing	1.11	0.99	0.28	2.15	4.01	75.18	0.38		84.08
Other	5.77	16.02	7.38	30.90	66.65	24.27	33.15		184.15
<b>Other Total</b>	<b>18.05</b>	<b>127.44</b>	<b>27.67</b>	<b>166.62</b>	<b>109.84</b>	<b>229.37</b>	<b>331.52</b>		<b>1,010.51</b>
<b>TOTAL</b>	<b>122.80</b>	<b>246.50</b>	<b>141.89</b>	<b>268.74</b>	<b>148.44</b>	<b>295.97</b>	<b>376.72</b>	<b>29.06</b>	<b>1,630.11</b>

Source: Tables 2A/2B and 3



**Table 6A - Future 2031 comparison goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>141.49</b>	<b>284.01</b>	<b>163.48</b>	<b>311.13</b>	<b>171.45</b>	<b>343.80</b>	<b>434.42</b>		<b>1,849.78</b>
Chichester town centre	88.15	105.37	78.31	107.65	29.66	60.17	43.01	32.70	545.01
Chichester other	31.55	30.39	29.26	10.27	14.92	17.19	6.08	0.70	140.36
Selsey	0.42	0.00	16.67	0.31	0.00	0.00	2.61	0.10	20.12
East Wittering/Bracklesham	0.28	0.00	6.54	0.00	0.00	0.00	0.00	0.03	6.86
Chichester rural	0.28	1.42	0.82	0.00	0.00	0.00	0.43	0.01	2.97
<b>Chichester District Total</b>	<b>120.69</b>	<b>137.18</b>	<b>131.60</b>	<b>118.23</b>	<b>44.58</b>	<b>77.36</b>	<b>52.13</b>	<b>33.55</b>	<b>715.31</b>
Bognor Regis	3.96	3.41	9.65	132.23	2.23	20.28	0.43		172.19
Havant/Waterlooville	1.41	80.66	2.29	1.87	4.11	0.34	255.00		345.69
Horsham	0.00	0.00	0.00	0.62	22.80	0.34	0.00		23.77
Littlehampton	0.00	0.85	0.16	4.98	1.54	127.55	0.00		135.09
Midhurst	0.00	1.70	0.00	0.00	7.89	0.00	0.00		9.59
Portsmouth	7.50	40.61	10.95	14.93	6.69	2.41	88.19		171.28
Worthing	1.27	1.14	0.33	2.49	4.63	87.33	0.43		97.61
Other	6.65	18.46	8.50	35.78	76.98	28.19	38.23		212.79
<b>Other Total</b>	<b>20.80</b>	<b>146.83</b>	<b>31.88</b>	<b>192.90</b>	<b>126.87</b>	<b>266.45</b>	<b>382.29</b>		<b>1,168.02</b>
<b>TOTAL</b>	<b>141.49</b>	<b>284.01</b>	<b>163.48</b>	<b>311.13</b>	<b>171.45</b>	<b>343.80</b>	<b>434.42</b>	<b>33.55</b>	<b>1,883.33</b>

**Table 6B - Future 2031 comparison goods expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>143.14</b>	<b>287.33</b>	<b>165.39</b>	<b>311.13</b>	<b>171.45</b>	<b>343.80</b>	<b>434.42</b>		<b>1,856.65</b>
Chichester town centre	89.18	106.60	79.22	107.65	29.66	60.17	43.01	32.90	548.38
Chichester other	31.92	30.74	29.60	10.27	14.92	17.19	6.08	0.71	141.43
Selsey	0.43	0.00	16.67	0.31	0.00	0.00	2.61	0.10	20.32
East Wittering/Bracklesham	0.29	0.00	6.62	0.00	0.00	0.00	0.00	0.03	6.94
Chichester rural	0.29	1.44	0.83	0.00	0.00	0.00	0.43	0.01	3.00
<b>Chichester District Total</b>	<b>122.10</b>	<b>138.78</b>	<b>133.14</b>	<b>118.23</b>	<b>44.58</b>	<b>77.36</b>	<b>52.13</b>	<b>33.76</b>	<b>720.07</b>
Bognor Regis	4.01	3.45	9.76	132.23	2.23	20.28	0.43		172.39
Havant/Waterlooville	1.43	81.60	2.32	1.87	4.11	0.34	255.00		346.68
Horsham	0.00	0.00	0.00	0.62	22.80	0.34	0.00		23.77
Littlehampton	0.00	0.86	0.17	4.98	1.54	127.55	0.00		135.10
Midhurst	0.00	1.72	0.00	0.00	7.89	0.00	0.00		9.61
Portsmouth	7.59	41.09	11.08	14.93	6.69	2.41	88.19		171.97
Worthing	1.29	1.15	0.33	2.49	4.63	87.33	0.43		97.65
Other	6.73	18.68	8.60	35.78	76.98	28.19	38.23		213.18
<b>Other Total</b>	<b>21.04</b>	<b>148.55</b>	<b>32.25</b>	<b>192.90</b>	<b>126.87</b>	<b>266.45</b>	<b>382.29</b>		<b>1,170.35</b>
<b>TOTAL</b>	<b>143.14</b>	<b>287.33</b>	<b>165.39</b>	<b>311.13</b>	<b>171.45</b>	<b>343.80</b>	<b>434.42</b>	<b>33.76</b>	<b>1,890.41</b>

Source: Tables 2A/2B and 3

**Table 7A - Future 2035 comparison goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>160.35</b>	<b>321.88</b>	<b>185.27</b>	<b>352.17</b>	<b>193.40</b>	<b>389.92</b>	<b>490.85</b>		<b>2,093.84</b>
Chichester town centre	99.90	119.42	88.75	121.85	33.46	68.24	48.59	37.03	617.24
Chichester other	35.76	34.44	33.16	11.62	16.83	19.50	6.87	0.79	158.97
Selsey	0.48	0.00	18.90	0.35	0.00	0.00	2.95	0.11	22.79
East Wittering/Bracklesham	0.32	0.00	7.41	0.00	0.00	0.00	0.00	0.04	7.77
Chichester rural	0.32	1.61	0.93	0.00	0.00	0.00	0.49	0.02	3.36
<b>Chichester District Total</b>	<b>136.78</b>	<b>155.47</b>	<b>149.15</b>	<b>133.82</b>	<b>50.28</b>	<b>87.73</b>	<b>58.90</b>	<b>38.00</b>	<b>810.13</b>
Bognor Regis	4.49	3.86	10.93	149.67	2.51	23.01	0.49		194.96
Havant/Waterlooville	1.60	91.41	2.59	2.11	4.64	0.39	288.13		390.88
Horsham	0.00	0.00	0.00	0.70	25.72	0.39	0.00		26.82
Littlehampton	0.00	0.97	0.19	5.63	1.74	144.66	0.00		153.19
Midhurst	0.00	1.93	0.00	0.00	8.90	0.00	0.00		10.83
Portsmouth	8.50	46.03	12.41	16.90	7.54	2.73	99.64		193.76
Worthing	1.44	1.29	0.37	2.82	5.22	99.04	0.49		110.67
Other	7.54	20.92	9.63	40.50	86.84	31.97	43.19		240.60
<b>Other Total</b>	<b>23.57</b>	<b>166.41</b>	<b>36.13</b>	<b>218.34</b>	<b>143.12</b>	<b>302.19</b>	<b>431.95</b>		<b>1,321.71</b>
<b>TOTAL</b>	<b>160.35</b>	<b>321.88</b>	<b>185.27</b>	<b>352.17</b>	<b>193.40</b>	<b>389.92</b>	<b>490.85</b>	<b>38.00</b>	<b>2,131.84</b>

**Table 7B - Future 2035 comparison goods expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>163.08</b>	<b>327.35</b>	<b>188.43</b>	<b>352.17</b>	<b>193.40</b>	<b>389.92</b>	<b>490.85</b>		<b>2,105.20</b>
Chichester town centre	101.60	121.45	90.26	121.85	33.46	68.24	48.59	37.37	622.81
Chichester other	36.37	35.03	33.73	11.62	16.83	19.50	6.87	0.80	160.74
Selsey	0.49	0.00	19.22	0.35	0.00	0.00	2.95	0.12	23.12
East Wittering/Bracklesham	0.33	0.00	7.54	0.00	0.00	0.00	0.00	0.04	7.90
Chichester rural	0.33	1.64	0.94	0.00	0.00	0.00	0.49	0.02	3.41
<b>Chichester District Total</b>	<b>139.11</b>	<b>158.11</b>	<b>151.68</b>	<b>133.82</b>	<b>50.28</b>	<b>87.73</b>	<b>58.90</b>	<b>38.34</b>	<b>817.99</b>
Bognor Regis	4.57	3.93	11.12	149.67	2.51	23.01	0.49		195.29
Havant/Waterlooville	1.63	92.97	2.64	2.11	4.64	0.39	288.13		392.51
Horsham	0.00	0.00	0.00	0.70	25.72	0.39	0.00		26.82
Littlehampton	0.00	0.98	0.19	5.63	1.74	144.66	0.00		153.21
Midhurst	0.00	1.96	0.00	0.00	8.90	0.00	0.00		10.86
Portsmouth	8.64	46.81	12.62	16.90	7.54	2.73	99.64		194.90
Worthing	1.47	1.31	0.38	2.82	5.22	99.04	0.49		110.72
Other	7.66	21.28	9.80	40.50	86.84	31.97	43.19		241.25
<b>Other Total</b>	<b>23.97</b>	<b>169.24</b>	<b>36.74</b>	<b>218.34</b>	<b>143.12</b>	<b>302.19</b>	<b>431.95</b>		<b>1,325.56</b>
<b>TOTAL</b>	<b>163.08</b>	<b>327.35</b>	<b>188.43</b>	<b>352.17</b>	<b>193.40</b>	<b>389.92</b>	<b>490.85</b>	<b>38.34</b>	<b>2,143.55</b>

Source: Tables 2A/2B and 3

**Table 8A - Future 2039 comparison goods expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>182.48</b>	<b>366.30</b>	<b>210.85</b>	<b>399.78</b>	<b>218.94</b>	<b>443.92</b>	<b>557.43</b>		<b>2,379.70</b>
Chichester town centre	113.68	135.90	101.00	138.33	37.88	77.69	55.19	42.11	701.76
Chichester other	40.69	39.19	37.74	13.19	19.05	22.20	7.80	0.90	180.77
Selsey	0.55	0.00	21.51	0.40	0.00	0.00	3.34	0.13	25.93
East Wittering/Bracklesham	0.36	0.00	8.43	0.00	0.00	0.00	0.00	0.04	8.84
Chichester rural	0.36	1.83	1.05	0.00	0.00	0.00	0.56	0.02	3.83
<b>Chichester District Total</b>	<b>155.65</b>	<b>176.92</b>	<b>169.73</b>	<b>151.92</b>	<b>56.93</b>	<b>99.88</b>	<b>66.89</b>	<b>43.20</b>	<b>921.13</b>
Bognor Regis	5.11	4.40	12.44	169.91	2.85	26.19	0.56		221.45
Havant/Waterlooville	1.82	104.03	2.95	2.40	5.25	0.44	327.21		444.12
Horsham	0.00	0.00	0.00	0.80	29.12	0.44	0.00		30.36
Littlehampton	0.00	1.10	0.21	6.40	1.97	164.69	0.00		174.37
Midhurst	0.00	2.20	0.00	0.00	10.07	0.00	0.00		12.27
Portsmouth	9.67	52.38	14.13	19.19	8.54	3.11	113.16		220.17
Worthing	1.64	1.47	0.42	3.20	5.91	112.75	0.56		125.95
Other	8.58	23.81	10.96	45.98	98.31	36.40	49.05		273.09
<b>Other Total</b>	<b>26.82</b>	<b>189.38</b>	<b>41.12</b>	<b>247.87</b>	<b>162.02</b>	<b>344.03</b>	<b>490.54</b>		<b>1,501.78</b>
<b>TOTAL</b>	<b>182.48</b>	<b>366.30</b>	<b>210.85</b>	<b>399.78</b>	<b>218.94</b>	<b>443.92</b>	<b>557.43</b>	<b>43.20</b>	<b>2,422.91</b>

**Table 8B - Future 2039 comparison goods expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>186.57</b>	<b>374.51</b>	<b>215.57</b>	<b>399.78</b>	<b>218.94</b>	<b>443.92</b>	<b>557.43</b>		<b>2,396.72</b>
Chichester town centre	116.23	138.94	103.26	138.33	37.88	77.69	55.19	42.61	710.11
Chichester other	41.60	40.07	38.59	13.19	19.05	22.20	7.80	0.92	183.42
Selsey	0.56	0.00	21.99	0.40	0.00	0.00	3.34	0.13	26.42
East Wittering/Bracklesham	0.37	0.00	8.62	0.00	0.00	0.00	0.00	0.05	9.04
Chichester rural	0.37	1.87	1.08	0.00	0.00	0.00	0.56	0.02	3.90
<b>Chichester District Total</b>	<b>159.14</b>	<b>180.89</b>	<b>173.54</b>	<b>151.92</b>	<b>56.93</b>	<b>99.88</b>	<b>66.89</b>	<b>43.72</b>	<b>932.90</b>
Bognor Regis	5.22	4.49	12.72	169.91	2.85	26.19	0.56		221.94
Havant/Waterlooville	1.87	106.36	3.02	2.40	5.25	0.44	327.21		446.55
Horsham	0.00	0.00	0.00	0.80	29.12	0.44	0.00		30.36
Littlehampton	0.00	1.12	0.22	6.40	1.97	164.69	0.00		174.40
Midhurst	0.00	2.25	0.00	0.00	10.07	0.00	0.00		12.32
Portsmouth	9.89	53.55	14.44	19.19	8.54	3.11	113.16		221.88
Worthing	1.68	1.50	0.43	3.20	5.91	112.75	0.56		126.03
Other	8.77	24.34	11.21	45.98	98.31	36.40	49.05		274.06
<b>Other Total</b>	<b>27.43</b>	<b>193.62</b>	<b>42.04</b>	<b>247.87</b>	<b>162.02</b>	<b>344.03</b>	<b>490.54</b>		<b>1,507.54</b>
<b>TOTAL</b>	<b>186.57</b>	<b>374.51</b>	<b>215.57</b>	<b>399.78</b>	<b>218.94</b>	<b>443.92</b>	<b>557.43</b>	<b>43.72</b>	<b>2,440.45</b>

Source: Tables 2A/2B and 3

Table 9A - Summary of comparison goods expenditure 2022 to 2039 (£M) - baseline growth

	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester town centre	425.36	470.71	545.01	617.24	701.76
Chichester other	109.55	121.21	140.36	158.97	180.77
Selsey	15.72	17.38	20.12	22.79	25.93
East Wittering/Bracklesham	5.35	5.92	6.86	7.77	8.84
Chichester rural	2.32	2.57	2.97	3.36	3.83
<b>Total</b>	<b>558.31</b>	<b>617.79</b>	<b>715.31</b>	<b>810.13</b>	<b>921.13</b>
<b>Turnover of existing facilities</b>					
Chichester town centre	425.36	487.22	547.49	606.69	672.29
Chichester other	109.55	125.48	141.00	156.25	173.15
Selsey	15.72	18.01	20.24	22.43	24.85
East Wittering/Bracklesham	5.35	6.13	6.89	7.64	8.46
Chichester rural	2.32	2.66	2.99	3.31	3.67
<b>Total</b>	<b>558.31</b>	<b>639.51</b>	<b>718.61</b>	<b>796.31</b>	<b>882.42</b>
<b>Surplus expenditure (£m)</b>					
Chichester town centre	0.00	-16.52	-2.48	10.55	29.47
Chichester other	0.00	-4.27	-0.64	2.72	7.63
Selsey	0.00	-0.63	-0.12	0.36	1.08
East Wittering/Bracklesham	0.00	-0.21	-0.04	0.13	0.38
Chichester rural	0.00	-0.09	-0.02	0.05	0.16
<b>Total</b>	<b>0.00</b>	<b>-21.72</b>	<b>-3.30</b>	<b>13.82</b>	<b>38.71</b>

Table 9B - Summary of comparison goods expenditure 2022 to 2039 (£M) - high growth

	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester town centre	425.36	471.99	548.38	622.81	710.11
Chichester other	109.55	121.62	141.43	160.74	183.42
Selsey	15.72	17.46	20.32	23.12	26.42
East Wittering/Bracklesham	5.35	5.95	6.94	7.90	9.04
Chichester rural	2.32	2.58	3.00	3.41	3.90
<b>Total</b>	<b>558.31</b>	<b>619.60</b>	<b>720.07</b>	<b>817.99</b>	<b>932.90</b>
<b>Turnover of existing facilities</b>					
Chichester town centre	425.36	487.22	547.49	606.69	672.29
Chichester other	109.55	125.48	141.00	156.25	173.15
Selsey	15.72	18.01	20.24	22.43	24.85
East Wittering/Bracklesham	5.35	6.13	6.89	7.64	8.46
Chichester rural	2.32	2.66	2.99	3.31	3.67
<b>Total</b>	<b>558.31</b>	<b>639.51</b>	<b>718.61</b>	<b>796.31</b>	<b>882.42</b>
<b>Surplus Expenditure (£m)</b>					
Chichester town centre	0.00	-15.23	0.89	16.12	37.83
Chichester other	0.00	-3.86	0.43	4.49	10.28
Selsey	0.00	-0.55	0.08	0.70	1.57
East Wittering/Bracklesham	0.00	-0.18	0.04	0.27	0.58
Chichester rural	0.00	-0.08	0.01	0.10	0.23
<b>Total</b>	<b>0.00</b>	<b>-19.91</b>	<b>1.46</b>	<b>21.68</b>	<b>50.49</b>

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b

**Table 10A - Chichester comparison goods floorspace capacity projections (baseline growth)**

	2022	2026	2031	2035	2039
<b>Turnover density new floorspace (£ per sq.m)</b>	£7,000	£8,018	£9,010	£9,984	£11,064
<b>Sales floorspace projection (sq.m net)</b>					
Chichester town centre	0	-2,060	-276	1,056	2,664
Chichester other	0	-533	-71	273	689
Selsey	0	-78	-13	37	97
East Wittering/Bracklesham	0	-27	-4	13	34
Chichester rural	0	-12	-2	5	14
<b>Total</b>	<b>0</b>	<b>-2,709</b>	<b>-366</b>	<b>1,384</b>	<b>3,499</b>
<b>Floorspace Projection (sq.m gross)</b>					
Chichester town centre	0	-2,747	-368	1,408	3,551
Chichester other	0	-710	-95	364	919
Selsey	0	-105	-18	49	130
East Wittering/Bracklesham	0	-35	-5	18	46
Chichester rural	0	-15	-3	7	19
<b>Total</b>	<b>0</b>	<b>-3,613</b>	<b>-488</b>	<b>1,846</b>	<b>4,665</b>

**Table 10B - Chichester comparison goods floorspace capacity projections (high growth)**

	2022	2026	2031	2035	2039
<b>Turnover density new floorspace (£ per sq.m)</b>	£7,000	£8,018	£9,010	£9,984	£11,064
<b>Sales floorspace projection (sq.m net)</b>					
Chichester town centre	0	-1,900	99	1,615	3,419
Chichester other	0	-482	47	450	929
Selsey	0	-69	9	70	142
East Wittering/Bracklesham	0	-23	5	27	52
Chichester rural	0	-10	1	10	21
<b>Total</b>	<b>0</b>	<b>-2,483</b>	<b>162</b>	<b>2,171</b>	<b>4,563</b>
<b>Floorspace Projection (sq.m gross)</b>					
Chichester town centre	0	-2,533	132	2,153	4,559
Chichester other	0	-642	63	600	1,238
Selsey	0	-92	12	93	190
East Wittering/Bracklesham	0	-30	7	36	70
Chichester rural	0	-14	2	14	28
<b>Total</b>	<b>0</b>	<b>-3,311</b>	<b>216</b>	<b>2,895</b>	<b>6,084</b>

Source: Table 9A/9B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b



## **Appendix 4 Food/beverage capacity**

**Table 1 - Food/beverage expenditure per person per annum (£)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	1,557	1,625	1,706	1,768	1,833
Zone 2 - Hayling Island/South Downs/Southbourne	1,647	1,719	1,805	1,871	1,939
Zone 3 - Selsey/East Wittering/Bracklesham	1,507	1,573	1,651	1,711	1,774
Zone 4 - Bognor Regis	1,378	1,438	1,510	1,565	1,622
Zone 5 - South Downs (North)	1,675	1,748	1,835	1,902	1,972
Zone 6 - Arundel/Littlehampton	1,451	1,514	1,590	1,648	1,708
Zone 7 - Waterlooville/Havant	1,334	1,393	1,462	1,516	1,571

*Experian Local Expenditure 2020 (2020 prices)*

*Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a*

**Table 2A - Total food/beverage expenditure (£m) - baseline growth**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	52.87	56.71	61.48	65.24	69.14
Zone 2 - Hayling Island/South Downs/Southbourne	93.42	100.24	108.68	115.32	122.16
Zone 3 - Selsey/East Wittering/Bracklesham	53.69	57.59	62.44	66.25	70.20
Zone 4 - Bognor Regis	104.01	111.81	121.19	128.43	135.72
Zone 5 - South Downs (North)	53.97	57.91	62.62	66.14	69.73
Zone 6 - Arundel/Littlehampton	113.10	121.91	132.58	140.78	149.25
Zone 7 - Waterlooville/Havant	141.49	151.49	163.54	173.02	182.98
<b>Study Area Total</b>	<b>612.56</b>	<b>657.67</b>	<b>712.52</b>	<b>755.18</b>	<b>799.18</b>

*Source: Tables 1A, Appendix 1 and Table 1, Appendix 4*

**Table 2B - Total food/beverage expenditure (£m)**

Zone	2022	2026	2031	2035	2039
Zone 1 - Chichester/Tangmere	52.87	57.00	62.20	66.35	70.69
Zone 2 - Hayling Island/South Downs/Southbourne	93.42	100.76	109.95	117.29	124.90
Zone 3 - Selsey/East Wittering/Bracklesham	53.69	57.88	63.16	67.38	71.78
Zone 4 - Bognor Regis	104.01	111.81	121.19	128.43	135.72
Zone 5 - South Downs (North)	53.97	57.91	62.62	66.14	69.73
Zone 6 - Arundel/Littlehampton	113.10	121.91	132.58	140.78	149.25
Zone 7 - Waterlooville/Havant	141.49	151.49	163.54	173.02	182.98
<b>Study Area Total</b>	<b>612.56</b>	<b>658.78</b>	<b>715.24</b>	<b>759.38</b>	<b>805.04</b>

*Source: Tables 1B in Appendix 1 and 1 in Appendix 4*



**Table 3 - Base year 2022 food and beverage market shares (%)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Chichester	87.8%	36.0%	50.0%	21.9%	12.2%	16.0%	8.5%	9.0%
Selsey	0.0%	0.0%	26.6%	0.0%	0.0%	0.0%	0.9%	3.0%
East Wittering / Bracklesham	0.8%	0.8%	12.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Other Chichester District	2.3%	8.2%	2.0%	0.8%	0.0%	1.0%	1.4%	3.0%
<b>Chichester District Total</b>	<b>90.9%</b>	<b>45.0%</b>	<b>90.6%</b>	<b>22.7%</b>	<b>12.2%</b>	<b>17.0%</b>	<b>10.8%</b>	
Havant/Waterlooville	0.6%	42.6%	0.5%	0.0%	0.6%	0.0%	60.9%	n/a
Bognor Regis/Littlehampton	1.7%	2.1%	3.5%	59.9%	0.0%	54.0%	0.0%	n/a
Portsmouth	4.7%	4.4%	0.9%	8.5%	0.0%	0.0%	18.4%	n/a
Other	2.1%	5.9%	4.5%	8.9%	87.2%	29.0%	9.9%	n/a
<b>Other Total</b>	<b>9.1%</b>	<b>55.0%</b>	<b>9.4%</b>	<b>77.3%</b>	<b>87.8%</b>	<b>83.0%</b>	<b>89.2%</b>	
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey January 2018 (weighted results) and The Visitor Economy of Chichester (Sept 2016) inc. Lichfields' estimates

**Table 4 - Base year 2022 food and beverage expenditure patterns (£M)**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2022</b>	<b>52.87</b>	<b>93.42</b>	<b>53.69</b>	<b>104.01</b>	<b>53.97</b>	<b>113.10</b>	<b>141.49</b>		<b>612.56</b>
Chichester	46.42	33.63	26.85	22.78	6.58	18.10	12.03	16.46	182.84
Selsey	0.00	0.00	14.28	0.00	0.00	0.00	1.27	0.48	16.04
East Wittering / Bracklesham	0.42	0.75	6.44	0.00	0.00	0.00	0.00	0.24	7.85
Other Chichester District	1.22	7.66	1.07	0.83	0.00	1.13	1.98	0.43	14.32
<b>Chichester District Total</b>	<b>48.06</b>	<b>42.04</b>	<b>48.65</b>	<b>23.61</b>	<b>6.58</b>	<b>19.23</b>	<b>15.28</b>	<b>17.60</b>	<b>221.05</b>
Havant/Waterlooville	0.32	39.80	0.27	0.00	0.32	0.00	86.17		126.88
Bognor Regis/Littlehampton	0.90	1.96	1.88	62.30	0.00	61.07	0.00		128.12
Portsmouth	2.49	4.11	0.48	8.84	0.00	0.00	26.03		41.95
Other	1.11	5.51	2.42	9.26	47.06	32.80	14.01		112.16
<b>Other Total</b>	<b>4.81</b>	<b>51.38</b>	<b>5.05</b>	<b>80.40</b>	<b>47.38</b>	<b>93.87</b>	<b>126.21</b>		<b>409.11</b>
<b>TOTAL</b>	<b>52.87</b>	<b>93.42</b>	<b>53.69</b>	<b>104.01</b>	<b>53.97</b>	<b>113.10</b>	<b>141.49</b>	<b>17.60</b>	<b>630.16</b>

Source: Tables 2A and 3

**Table 5A - Future 2026 food and beverage expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>56.71</b>	<b>100.24</b>	<b>57.59</b>	<b>111.81</b>	<b>57.91</b>	<b>121.91</b>	<b>151.49</b>		<b>657.67</b>
Chichester	49.79	36.09	28.79	24.49	7.07	19.51	12.88	17.66	196.27
Selsey	0.00	0.00	15.32	0.00	0.00	0.00	1.36	0.52	17.20
East Wittering / Bracklesham	0.45	0.80	6.91	0.00	0.00	0.00	0.00	0.25	8.42
Other Chichester District	1.30	8.22	1.15	0.89	0.00	1.22	2.12	0.46	15.37
<b>Chichester District Total</b>	<b>51.54</b>	<b>45.11</b>	<b>52.17</b>	<b>25.38</b>	<b>7.07</b>	<b>20.73</b>	<b>16.36</b>	<b>18.89</b>	<b>237.26</b>
Havant/Waterlooville	0.34	42.70	0.29	0.00	0.35	0.00	92.26		135.94
Bognor Regis/Littlehampton	0.96	2.11	2.02	66.98	0.00	65.83	0.00		137.89
Portsmouth	2.67	4.41	0.52	9.50	0.00	0.00	27.88		44.97
Other	1.19	5.91	2.59	9.95	50.50	35.35	15.00		120.50
<b>Other Total</b>	<b>5.16</b>	<b>55.13</b>	<b>5.41</b>	<b>86.43</b>	<b>50.85</b>	<b>101.19</b>	<b>135.13</b>		<b>439.31</b>
<b>TOTAL</b>	<b>56.71</b>	<b>100.24</b>	<b>57.59</b>	<b>111.81</b>	<b>57.91</b>	<b>121.91</b>	<b>151.49</b>	<b>18.89</b>	<b>676.56</b>

**Table 5B - Future 2026 food and beverage expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2026</b>	<b>57.00</b>	<b>100.76</b>	<b>57.88</b>	<b>111.81</b>	<b>57.91</b>	<b>121.91</b>	<b>151.49</b>		<b>658.78</b>
Chichester	50.04	36.27	28.94	24.49	7.07	19.51	12.88	17.72	196.92
Selsey	0.00	0.00	15.40	0.00	0.00	0.00	1.36	0.52	17.28
East Wittering / Bracklesham	0.46	0.81	6.95	0.00	0.00	0.00	0.00	0.25	8.46
Other Chichester District	1.31	8.26	1.16	0.89	0.00	1.22	2.12	0.46	15.43
<b>Chichester District Total</b>	<b>51.81</b>	<b>45.34</b>	<b>52.44</b>	<b>25.38</b>	<b>7.07</b>	<b>20.73</b>	<b>16.36</b>	<b>18.96</b>	<b>238.09</b>
Havant/Waterlooville	0.34	42.92	0.29	0.00	0.35	0.00	92.26		136.16
Bognor Regis/Littlehampton	0.97	2.12	2.03	66.98	0.00	65.83	0.00		137.92
Portsmouth	2.68	4.43	0.52	9.50	0.00	0.00	27.88		45.01
Other	1.20	5.94	2.60	9.95	50.50	35.35	15.00		120.55
<b>Other Total</b>	<b>5.19</b>	<b>55.42</b>	<b>5.44</b>	<b>86.43</b>	<b>50.85</b>	<b>101.19</b>	<b>135.13</b>		<b>439.65</b>
<b>TOTAL</b>	<b>57.00</b>	<b>100.76</b>	<b>57.88</b>	<b>111.81</b>	<b>57.91</b>	<b>121.91</b>	<b>151.49</b>	<b>18.96</b>	<b>677.73</b>

Source: Tables 2A/2B and 3

**Table 6A - Future 2031 food and beverage expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>61.48</b>	<b>108.68</b>	<b>62.44</b>	<b>121.19</b>	<b>62.62</b>	<b>132.58</b>	<b>163.54</b>		<b>712.52</b>
Chichester	53.98	39.12	31.22	26.54	7.64	21.21	13.90	19.15	212.76
Selsey	0.00	0.00	16.61	0.00	0.00	0.00	1.47	0.56	18.64
East Wittering / Bracklesham	0.49	0.87	7.49	0.00	0.00	0.00	0.00	0.27	9.13
Other Chichester District	1.41	8.91	1.25	0.97	0.00	1.33	2.29	0.50	16.66
<b>Chichester District Total</b>	<b>55.88</b>	<b>48.91</b>	<b>56.57</b>	<b>27.51</b>	<b>7.64</b>	<b>22.54</b>	<b>17.66</b>	<b>20.48</b>	<b>257.19</b>
Havant/Waterlooville	0.37	46.30	0.31	0.00	0.38	0.00	99.60		146.95
Bognor Regis/Littlehampton	1.05	2.28	2.19	72.59	0.00	71.59	0.00		149.70
Portsmouth	2.89	4.78	0.56	10.30	0.00	0.00	30.09		48.63
Other	1.29	6.41	2.81	10.79	54.60	38.45	16.19		130.54
<b>Other Total</b>	<b>5.59</b>	<b>59.77</b>	<b>5.87</b>	<b>93.68</b>	<b>54.98</b>	<b>110.04</b>	<b>145.88</b>		<b>475.82</b>
<b>TOTAL</b>	<b>61.48</b>	<b>108.68</b>	<b>62.44</b>	<b>121.19</b>	<b>62.62</b>	<b>132.58</b>	<b>163.54</b>	<b>20.48</b>	<b>733.00</b>

**Table 6B - Future 2031 food and beverage expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2031</b>	<b>62.20</b>	<b>109.95</b>	<b>63.16</b>	<b>121.19</b>	<b>62.62</b>	<b>132.58</b>	<b>163.54</b>		<b>715.24</b>
Chichester	54.61	39.58	31.58	26.54	7.64	21.21	13.90	19.29	214.36
Selsey	0.00	0.00	16.80	0.00	0.00	0.00	1.47	0.57	18.84
East Wittering / Bracklesham	0.50	0.88	7.58	0.00	0.00	0.00	0.00	0.28	9.23
Other Chichester District	1.43	9.02	1.26	0.97	0.00	1.33	2.29	0.50	16.80
<b>Chichester District Total</b>	<b>56.54</b>	<b>49.48</b>	<b>57.23</b>	<b>27.51</b>	<b>7.64</b>	<b>22.54</b>	<b>17.66</b>	<b>20.64</b>	<b>259.23</b>
Havant/Waterlooville	0.37	46.84	0.32	0.00	0.38	0.00	99.60		147.50
Bognor Regis/Littlehampton	1.06	2.31	2.21	72.59	0.00	71.59	0.00		149.76
Portsmouth	2.92	4.84	0.57	10.30	0.00	0.00	30.09		48.72
Other	1.31	6.49	2.84	10.79	54.60	38.45	16.19		130.66
<b>Other Total</b>	<b>5.66</b>	<b>60.47</b>	<b>5.94</b>	<b>93.68</b>	<b>54.98</b>	<b>110.04</b>	<b>145.88</b>		<b>476.65</b>
<b>TOTAL</b>	<b>62.20</b>	<b>109.95</b>	<b>63.16</b>	<b>121.19</b>	<b>62.62</b>	<b>132.58</b>	<b>163.54</b>	<b>20.64</b>	<b>735.88</b>

Source: Tables 2A/2B and 3

**Table 7A - Future 2035 food and beverage expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>65.24</b>	<b>115.32</b>	<b>66.25</b>	<b>128.43</b>	<b>66.14</b>	<b>140.78</b>	<b>173.02</b>		<b>755.18</b>
Chichester	57.28	41.52	33.13	28.13	8.07	22.53	14.71	20.31	225.66
Selsey	0.00	0.00	17.62	0.00	0.00	0.00	1.56	0.59	19.77
East Wittering / Bracklesham	0.52	0.92	7.95	0.00	0.00	0.00	0.00	0.29	9.69
Other Chichester District	1.50	9.46	1.33	1.03	0.00	1.41	2.42	0.53	17.67
<b>Chichester District Total</b>	<b>59.30</b>	<b>51.90</b>	<b>60.02</b>	<b>29.15</b>	<b>8.07</b>	<b>23.93</b>	<b>18.69</b>	<b>21.72</b>	<b>272.78</b>
Havant/Waterlooville	0.39	49.13	0.33	0.00	0.40	0.00	105.37		155.61
Bognor Regis/Littlehampton	1.11	2.42	2.32	76.93	0.00	76.02	0.00		158.80
Portsmouth	3.07	5.07	0.60	10.92	0.00	0.00	31.83		51.49
Other	1.37	6.80	2.98	11.43	57.67	40.83	17.13		138.21
<b>Other Total</b>	<b>5.94</b>	<b>63.43</b>	<b>6.23</b>	<b>99.28</b>	<b>58.07</b>	<b>116.85</b>	<b>154.33</b>		<b>504.12</b>
<b>TOTAL</b>	<b>65.24</b>	<b>115.32</b>	<b>66.25</b>	<b>128.43</b>	<b>66.14</b>	<b>140.78</b>	<b>173.02</b>	<b>21.72</b>	<b>776.90</b>

**Table 7B - Future 2035 food and beverage expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2035</b>	<b>66.35</b>	<b>117.29</b>	<b>67.38</b>	<b>128.43</b>	<b>66.14</b>	<b>140.78</b>	<b>173.02</b>		<b>759.38</b>
Chichester	58.25	42.22	33.69	28.13	8.07	22.53	14.71	20.53	228.12
Selsey	0.00	0.00	17.92	0.00	0.00	0.00	1.56	0.60	20.08
East Wittering / Bracklesham	0.53	0.94	8.09	0.00	0.00	0.00	0.00	0.30	9.85
Other Chichester District	1.53	9.62	1.35	1.03	0.00	1.41	2.42	0.54	17.89
<b>Chichester District Total</b>	<b>60.31</b>	<b>52.78</b>	<b>61.05</b>	<b>29.15</b>	<b>8.07</b>	<b>23.93</b>	<b>18.69</b>	<b>21.97</b>	<b>275.94</b>
Havant/Waterlooville	0.40	49.96	0.34	0.00	0.40	0.00	105.37		156.46
Bognor Regis/Littlehampton	1.13	2.46	2.36	76.93	0.00	76.02	0.00		158.90
Portsmouth	3.12	5.16	0.61	10.92	0.00	0.00	31.83		51.64
Other	1.39	6.92	3.03	11.43	57.67	40.83	17.13		138.40
<b>Other Total</b>	<b>6.04</b>	<b>64.51</b>	<b>6.33</b>	<b>99.28</b>	<b>58.07</b>	<b>116.85</b>	<b>154.33</b>		<b>505.41</b>
<b>TOTAL</b>	<b>66.35</b>	<b>117.29</b>	<b>67.38</b>	<b>128.43</b>	<b>66.14</b>	<b>140.78</b>	<b>173.02</b>	<b>21.97</b>	<b>781.35</b>

Source: Tables 2A/2B and 3

**Table 8A - Future 2039 food and beverage expenditure patterns (£M) - baseline growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>69.14</b>	<b>122.16</b>	<b>70.20</b>	<b>135.72</b>	<b>69.73</b>	<b>149.25</b>	<b>182.98</b>		<b>799.18</b>
Chichester	60.70	43.98	35.10	29.72	8.51	23.88	15.55	21.51	238.95
Selsey	0.00	0.00	18.67	0.00	0.00	0.00	1.65	0.63	20.95
East Wittering / Bracklesham	0.55	0.98	8.42	0.00	0.00	0.00	0.00	0.31	10.26
Other Chichester District	1.59	10.02	1.40	1.09	0.00	1.49	2.56	0.56	18.71
<b>Chichester District Total</b>	<b>62.85</b>	<b>54.97</b>	<b>63.60</b>	<b>30.81</b>	<b>8.51</b>	<b>25.37</b>	<b>19.76</b>	<b>23.00</b>	<b>288.88</b>
Havant/Waterlooville	0.41	52.04	0.35	0.00	0.42	0.00	111.43		164.66
Bognor Regis/Littlehampton	1.18	2.57	2.46	81.29	0.00	80.60	0.00		168.09
Portsmouth	3.25	5.38	0.63	11.54	0.00	0.00	33.67		54.46
Other	1.45	7.21	3.16	12.08	60.80	43.28	18.11		146.10
<b>Other Total</b>	<b>6.29</b>	<b>67.19</b>	<b>6.60</b>	<b>104.91</b>	<b>61.22</b>	<b>123.88</b>	<b>163.22</b>		<b>533.31</b>
<b>TOTAL</b>	<b>69.14</b>	<b>122.16</b>	<b>70.20</b>	<b>135.72</b>	<b>69.73</b>	<b>149.25</b>	<b>182.98</b>	<b>23.00</b>	<b>822.18</b>

**Table 8B - Future 2039 food and beverage expenditure patterns (£M) - high growth**

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
<b>Expenditure 2039</b>	<b>70.69</b>	<b>124.90</b>	<b>71.78</b>	<b>135.72</b>	<b>69.73</b>	<b>149.25</b>	<b>182.98</b>		<b>805.04</b>
Chichester	62.06	44.96	35.89	29.72	8.51	23.88	15.55	21.82	242.39
Selsey	0.00	0.00	19.09	0.00	0.00	0.00	1.65	0.64	21.38
East Wittering / Bracklesham	0.57	1.00	8.61	0.00	0.00	0.00	0.00	0.31	10.49
Other Chichester District	1.63	10.24	1.44	1.09	0.00	1.49	2.56	0.57	19.01
<b>Chichester District Total</b>	<b>64.25</b>	<b>56.20</b>	<b>65.03</b>	<b>30.81</b>	<b>8.51</b>	<b>25.37</b>	<b>19.76</b>	<b>23.34</b>	<b>293.28</b>
Havant/Waterlooville	0.42	53.21	0.36	0.00	0.42	0.00	111.43		165.84
Bognor Regis/Littlehampton	1.20	2.62	2.51	81.29	0.00	80.60	0.00		168.23
Portsmouth	3.32	5.50	0.65	11.54	0.00	0.00	33.67		54.67
Other	1.48	7.37	3.23	12.08	60.80	43.28	18.11		146.36
<b>Other Total</b>	<b>6.43</b>	<b>68.69</b>	<b>6.75</b>	<b>104.91</b>	<b>61.22</b>	<b>123.88</b>	<b>163.22</b>		<b>535.10</b>
<b>TOTAL</b>	<b>70.69</b>	<b>124.90</b>	<b>71.78</b>	<b>135.72</b>	<b>69.73</b>	<b>149.25</b>	<b>182.98</b>	<b>23.34</b>	<b>828.38</b>

Source: Tables 2A/2B and 3

**Table 9A - Summary of food and beverage expenditure 2022 to 2039 (£M) - baseline growth**

Area	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester	182.84	196.27	212.76	225.66	238.95
Selsey	16.04	17.20	18.64	19.77	20.95
East Wittering / Bracklesham	7.85	8.42	9.13	9.69	10.26
Other Chichester District	14.32	15.37	16.66	17.67	18.71
<b>Total</b>	<b>221.05</b>	<b>237.26</b>	<b>257.19</b>	<b>272.78</b>	<b>288.88</b>
<b>Turnover of existing facilities</b>					
Chichester	182.84	190.27	199.97	208.09	216.54
Selsey	16.04	16.69	17.54	18.25	18.99
East Wittering / Bracklesham	7.85	8.17	8.58	8.93	9.30
Other Chichester District	14.32	14.91	15.67	16.30	16.96
<b>Total</b>	<b>221.05</b>	<b>230.03</b>	<b>241.76</b>	<b>251.58</b>	<b>261.80</b>

**Table 9B - Summary of food and beverage expenditure 2022 to 2039 (£M) - high growth**

Area	2022	2026	2031	2035	2039
<b>Available expenditure</b>					
Chichester	182.84	196.92	214.36	228.12	242.39
Selsey	16.04	17.28	18.84	20.08	21.38
East Wittering / Bracklesham	7.85	8.46	9.23	9.85	10.49
Other Chichester District	14.32	15.43	16.80	17.89	19.01
<b>Total</b>	<b>221.05</b>	<b>238.09</b>	<b>259.23</b>	<b>275.94</b>	<b>293.28</b>
<b>Turnover of existing facilities</b>					
Chichester	182.84	190.27	199.97	208.09	216.54
Selsey	16.04	16.69	17.54	18.25	18.99
East Wittering / Bracklesham	7.85	8.17	8.58	8.93	9.30
Other Chichester District	14.32	14.91	15.67	16.30	16.96
<b>Total</b>	<b>221.05</b>	<b>230.03</b>	<b>241.76</b>	<b>251.58</b>	<b>261.80</b>

Source: Tables 4 to 8B

**Table 10A: Food and beverage floorspace capacity (baseline growth)**

	2022	2026	2031	2035	2039
<b>Surplus/deficit expenditure (£m)</b>					
Chichester	0.00	6.00	12.79	17.56	22.41
Selsey	0.00	0.51	1.10	1.52	1.96
East Wittering / Bracklesham	0.00	0.25	0.54	0.75	0.97
Other Chichester District	0.00	0.47	0.99	1.37	1.75
<b>TOTAL</b>	<b>0.00</b>	<b>7.22</b>	<b>15.42</b>	<b>21.20</b>	<b>27.08</b>
<b>Turnover density new floorspace (£ per sq.m)</b>	<b>£5,100</b>	<b>£5,307</b>	<b>£5,578</b>	<b>£5,804</b>	<b>£6,040</b>
<b>Floorspace Projection (sq.m gross)</b>					
Chichester	0	1,130	2,293	3,026	3,710
Selsey	0	96	197	262	324
East Wittering / Bracklesham	0	47	97	130	160
Other Chichester District	0	88	178	236	289
<b>TOTAL</b>	<b>0</b>	<b>1,361</b>	<b>2,765</b>	<b>3,653</b>	<b>4,483</b>

**Table 10B: Food and beverage floorspace capacity - high growth**

	2022	2026	2031	2035	2039
<b>Surplus/deficit expenditure (£m)</b>					
Chichester	0.00	6.65	14.38	20.03	25.85
Selsey	0.00	0.59	1.30	1.83	2.39
East Wittering / Bracklesham	0.00	0.29	0.65	0.92	1.20
Other Chichester District	0.00	0.52	1.13	1.58	2.05
<b>TOTAL</b>	<b>0.00</b>	<b>8.06</b>	<b>17.46</b>	<b>24.36</b>	<b>31.48</b>
<b>Turnover density new floorspace (£ per sq.m)</b>	<b>£5,100</b>	<b>£5,307</b>	<b>£5,578</b>	<b>£5,804</b>	<b>£6,040</b>
<b>Floorspace Projection (sq.m gross)</b>					
Chichester	0	1,253	2,579	3,451	4,280
Selsey	0	111	233	315	395
East Wittering / Bracklesham	0	55	116	158	198
Other Chichester District	0	98	203	273	339
<b>TOTAL</b>	<b>0</b>	<b>1,518</b>	<b>3,131</b>	<b>4,197</b>	<b>5,212</b>

Source: Table 9A/9B







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