



Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Re:Map

Scenario 1: Baseline Capacity

Assumptions: No change in market share
 Increase in turnover efficiency of: 1.5% per annum
 Forecast growth in average spend of: 4.4% per annum

STAGE 1: PROJECTED CHANGES IN CATCHMENT POPULATION & SPENDING (all monetary figures expressed in constant 2000 prices):

	2001	2004	2008	2011	2016	CHANGE: 2001 - 2016	
						£m	%
CORE BOROUGH CATCHMENT							
Zone 1							
- Population ⁽¹⁾	75,601	76,056	76,666	77,127	77,901		3.0%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£2,990	£3,402	£4,042	£4,599	£5,704		90.8%
Total Spend £m	£226.0	£258.8	£309.9	£354.7	£444.3		96.6%
OUTER BOROUGH CATCHMENT							
Zone 2							
- Population ⁽¹⁾	20,940	21,066	21,235	21,363	21,577		3.0%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£2,949	£3,356	£3,986	£4,536	£5,626		90.8%
Total Spend £m	£61.8	£70.7	£84.7	£96.9	£121.4		96.6%
Zone 3							
- Population ⁽¹⁾	55,678	56,097	56,660	57,086	57,803		3.8%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£3,016	£3,432	£4,077	£4,639	£5,754		90.8%
Total Spend £m	£167.9	£192.5	£231.0	£264.8	£332.6		98.0%
Zone 4							
- Population ⁽¹⁾	57,555	58,214	59,104	59,780	60,924		5.9%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£3,132	£3,564	£4,234	£4,818	£5,975		90.8%
Total Spend £m	£180.3	£207.5	£250.2	£288.0	£364.0		101.9%
Zone 5							
- Population ⁽¹⁾	23,992	24,267	24,638	24,919	25,397		5.9%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£3,265	£3,715	£4,414	£5,022	£6,229		90.8%
Total Spend £m	£78.3	£90.2	£108.7	£125.1	£158.2		101.9%
Zone 6							
- Population ⁽¹⁾	28,160	28,118	28,062	28,020	27,950		-0.7%
- Average comparison goods spending (£ per capita): ^{(2) (3)}	£2,985	£3,397	£4,035	£4,591	£5,694		90.8%
Total Spend £m	£84.1	£95.5	£113.2	£128.7	£159.2		89.3%
Total Population	261,926	263,816	266,363	268,294	271,551		3.7%
- TOTAL COMPARISON GOODS SPENDING:(£million)	£798.4	£915.1	£1,067.7	£1,258.2	£1,579.7	£781	97.9%

NOTES:

(1) Year 2001 (base) population derived from MapInfo TargetPro system. Population projections derived from Woking Borough Council who were supplied by Surrey County Council with a Draft Interim 2001 based Population and Household Forecasts. For Zone 1 the projection is based on the projection rate for Woking BC; for Zone 2 this is also based on the projection rate for Woking BC; for Zone 3 this is based on the projection rate for Guildford BC; for Zone 4 this is based on the average of the projections for Guildford BC and Surrey Heath BC; for Zone 5 this is based on the average of the projections for Guildford BC and Surrey Heath BC and for Zone 6 this is based on the projection for Runnymede BC.

(2) 2001 (base) expenditure derived from MapInfo TargetPro dataset. Projections based on 4.4% p.a., this is based on DTZ's in-house view of comparison goods expenditure growth (September 2004).

(3) Expenditure on special forms of trading (e.g. mail order) has NOT been deducted from the average spend estimates. Assume 7.6% of total available spend is on mail order, vending machines, internet, etc.

Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Scenario 1: Baseline Capacity

STAGE 2: TOWN CENTRE & OUT OF TOWN RETAIL WAREHOUSE FLOORSPACE (net square metres):

		2001	2004	2008	2011	2016
TOWN CENTRE DISTRICT FLOORSPACE ⁽¹⁾:						
DEFINED SHOPPING CENTRE	WOKING	43,666	43,666	43,666	43,666	43,666
DISTRICT CENTRES	WEST BYFLEET	4,285	4,285	4,285	4,285	4,285
	Sub-Total	47,951	47,951	47,951	47,951	47,951
RETAIL WAREHOUSE FLOORSPACE IN WOKING BC :						
	LION RETAIL PARK, WOKING ⁽²⁾	5,438	5,438	5,438	5,438	5,438
	HOMEBASE, BROOKWOOD	2,964	2,964	2,964	2,964	2,964
	Sub-Total	8,402	8,402	8,402	8,402	8,402
TOTAL COMPARISON GOODS FLOORSPACE:		56,353	56,353	56,353	56,353	56,353

NOTES:

(1) Net floorspace derived from GOAD Town Centre summary report (using net to gross ratio of 75% for town centre and 80% for out of town floorspace). Floorspace excludes vacant space.

(2) Lion Retail Park comprises of the following occupants Carpetright (624 sq.m. net), Currys (800 sq.m.net), Focus DIY (2590 sq.m. net), Halfords (800 sq.m. net) and Harveys (624 sq.m. net). Floorspace derived from Woking BC.

Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Scenario 1: Baseline Capacity

STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend)

ZONE 1		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	34.6%	34.6%	34.6%	34.6%	34.6%
DISTRICT CENTRES	Byfleet	0.7%	0.7%	0.7%	0.7%	0.7%
	Knaphill	0.4%	0.4%	0.4%	0.4%	0.4%
	Maybury	0.2%	0.2%	0.2%	0.2%	0.2%
	West Byfleet	0.9%	0.9%	0.9%	0.9%	0.9%
RETAIL WAREHOUSES	Lion Retail Park, Woking	9.8%	9.8%	9.8%	9.8%	9.8%
	Homebase, Brookwood	1.6%	1.6%	1.6%	1.6%	1.6%
OTHER MAJOR CENTRES	Camberley	0.6%	0.6%	0.6%	0.6%	0.6%
	Farnborough	1.5%	1.5%	1.5%	1.5%	1.5%
	Guildford	19.6%	19.6%	19.6%	19.6%	19.6%
	Kingston	2.9%	2.9%	2.9%	2.9%	2.9%
	London	3.9%	3.9%	3.9%	3.9%	3.9%
	Staines	0.4%	0.4%	0.4%	0.4%	0.4%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE		15.5%	15.5%	15.5%	15.5%	15.5%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%

ZONE 2		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	19.6%	19.6%	19.6%	19.6%	19.6%
DISTRICT CENTRES	Byfleet	1.7%	1.7%	1.7%	1.7%	1.7%
	Knaphill	0.0%	0.0%	0.0%	0.0%	0.0%
	Maybury	0.0%	0.0%	0.0%	0.0%	0.0%
	West Byfleet	8.7%	8.7%	8.7%	8.7%	8.7%
RETAIL WAREHOUSES	Lion Retail Park, Woking	3.2%	3.2%	3.2%	3.2%	3.2%
	Homebase, Brookwood	1.1%	1.1%	1.1%	1.1%	1.1%
OTHER MAJOR CENTRES	Camberley	0.6%	0.6%	0.6%	0.6%	0.6%
	Farnborough	5.3%	5.3%	5.3%	5.3%	5.3%
	Guildford	17.7%	17.7%	17.7%	17.7%	17.7%
	Kingston	2.4%	2.4%	2.4%	2.4%	2.4%
	London	3.8%	3.8%	3.8%	3.8%	3.8%
	Staines	8.0%	8.0%	8.0%	8.0%	8.0%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE		20.4%	20.4%	20.4%	20.4%	20.4%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%

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Scenario 1: Baseline Capacity

STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend)

ZONE 3		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	6.4%	6.4%	6.4%	6.4%	6.4%
DISTRICT CENTRES	Byfleet	0.4%	0.4%	0.4%	0.4%	0.4%
	Knaphill	0.0%	0.0%	0.0%	0.0%	0.0%
	Maybury	0.0%	0.0%	0.0%	0.0%	0.0%
	West Byfleet	0.0%	0.0%	0.0%	0.0%	0.0%
RETAIL WAREHOUSES	Lion Retail Park, Woking	1.0%	1.0%	1.0%	1.0%	1.0%
	Homebase, Brookwood	0.1%	0.1%	0.1%	0.1%	0.1%
OTHER MAJOR CENTRES	Camberley	0.9%	0.9%	0.9%	0.9%	0.9%
	Farnborough	1.8%	1.8%	1.8%	1.8%	1.8%
	Guildford	65.9%	65.9%	65.9%	65.9%	65.9%
	Kingston	0.4%	0.4%	0.4%	0.4%	0.4%
	London	3.9%	3.9%	3.9%	3.9%	3.9%
	Staines	0.2%	0.2%	0.2%	0.2%	0.2%
OTHER MAJOR SHOP LOCATIONS AND STORES ELSEWHERE		11.5%	11.5%	11.5%	11.5%	11.5%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%
ZONE 4		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	2.3%	2.3%	2.3%	2.3%	2.3%
DISTRICT CENTRES	Byfleet	0.1%	0.1%	0.1%	0.1%	0.1%
	Knaphill	0.0%	0.0%	0.0%	0.0%	0.0%
	Maybury	0.0%	0.0%	0.0%	0.0%	0.0%
	West Byfleet	0.0%	0.0%	0.0%	0.0%	0.0%
RETAIL WAREHOUSES	Lion Retail Park, Woking	0.4%	0.4%	0.4%	0.4%	0.4%
	Homebase, Brookwood	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER MAJOR CENTRES	Camberley	35.8%	35.8%	35.8%	35.8%	35.8%
	Farnborough	19.5%	19.5%	19.5%	19.5%	19.5%
	Guildford	14.1%	14.1%	14.1%	14.1%	14.1%
	Kingston	0.0%	0.0%	0.0%	0.0%	0.0%
	London	2.7%	2.7%	2.7%	2.7%	2.7%
	Staines	0.3%	0.3%	0.3%	0.3%	0.3%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE		17.2%	17.2%	17.2%	17.2%	17.2%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%

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STAGE 3: MARKET SHARE ESTIMATES (% of available comparison goods spend)

ZONE 5		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	28.4%	28.4%	28.4%	28.4%	28.4%
DISTRICT CENTRES	Byfleet	0.2%	0.2%	0.2%	0.2%	0.2%
	Knaphill	0.4%	0.4%	0.4%	0.4%	0.4%
	Maybury	0.0%	0.0%	0.0%	0.0%	0.0%
	West Byfleet	0.0%	0.0%	0.0%	0.0%	0.0%
RETAIL WAREHOUSES	Lion Retail Park, Woking	4.2%	4.2%	4.2%	4.2%	4.2%
	Homebase, Brookwood	3.0%	3.0%	3.0%	3.0%	3.0%
OTHER MAJOR CENTRES	Camberley	14.0%	14.0%	14.0%	14.0%	14.0%
	Farnborough	8.4%	8.4%	8.4%	8.4%	8.4%
	Guildford	15.8%	15.8%	15.8%	15.8%	15.8%
	Kingston	0.2%	0.2%	0.2%	0.2%	0.2%
	London	1.4%	1.4%	1.4%	1.4%	1.4%
	Staines	0.9%	0.9%	0.9%	0.9%	0.9%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE		15.5%	15.5%	15.5%	15.5%	15.5%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%

ZONE 6		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE	Woking	7.7%	7.7%	7.7%	7.7%	7.7%
DISTRICT CENTRES	Byfleet	0.0%	0.0%	0.0%	0.0%	0.0%
	Knaphill	0.0%	0.0%	0.0%	0.0%	0.0%
	Maybury	0.0%	0.0%	0.0%	0.0%	0.0%
	West Byfleet	0.0%	0.0%	0.0%	0.0%	0.0%
RETAIL WAREHOUSES	Lion Retail Park, Woking	0.9%	0.9%	0.9%	0.9%	0.9%
	Homebase, Brookwood	0.1%	0.1%	0.1%	0.1%	0.1%
OTHER MAJOR CENTRES	Camberley	0.4%	0.4%	0.4%	0.4%	0.4%
	Farnborough	5.2%	5.2%	5.2%	5.2%	5.2%
	Guildford	26.2%	26.2%	26.2%	26.2%	26.2%
	Kingston	1.8%	1.8%	1.8%	1.8%	1.8%
	London	6.5%	6.5%	6.5%	6.5%	6.5%
	Staines	20.9%	20.9%	20.9%	20.9%	20.9%
OTHER MAJOR CENTRES, SHOPS AND STORES ELSEWHERE		22.8%	22.8%	22.8%	22.8%	22.8%
INTERNET, MAIL ORDER AND OTHER TYPES OF HOME SHOPPING		7.6%	7.6%	7.6%	7.6%	7.6%
TOTAL ESTIMATED MARKET SHARE:		100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:



Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Scenario 1: Baseline Capacity

STAGE 4: TRADE DRAW ESTIMATES (% of comparison goods turnover derived from inside and outside the core zone)

	2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE					
WOKING					
Trade Draw from Zone 1 Catchment	53%	53%	52%	52%	52%
Trade Draw from Zone 2 Catchment	8%	8%	8%	8%	8%
Trade Draw from Zone 3 Catchment	7%	7%	7%	7%	7%
Trade Draw from Zone 4 Catchment	3%	3%	3%	3%	3%
Trade Draw from Zone 5 Catchment	15%	15%	15%	15%	15%
Trade Draw from Zone 6 Catchment	4%	4%	4%	4%	4%
Trade Draw from Elsewhere	10%	10%	10%	10%	10%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
DISTRICT CENTRE					
WEST BYFLEET					
Trade Draw from Zone 1 Catchment	25%	25%	25%	25%	25%
Trade Draw from Zone 2 Catchment	70%	70%	70%	70%	70%
Trade Draw from Zone 3 Catchment	0%	0%	0%	0%	0%
Trade Draw from Zone 4 Catchment	0%	0%	0%	0%	0%
Trade Draw from Zone 5 Catchment	0%	0%	0%	0%	0%
Trade Draw from Zone 6 Catchment	0%	0%	0%	0%	0%
Trade Draw from Elsewhere	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%
ALL RETAIL WAREHOUSES					
Trade Draw from Zone 1 Catchment	66%	66%	65%	65%	65%
Trade Draw from Zone 2 Catchment	7%	7%	7%	7%	7%
Trade Draw from Zone 3 Catchment	4%	4%	4%	5%	5%
Trade Draw from Zone 4 Catchment	2%	2%	2%	2%	2%
Trade Draw from Zone 5 Catchment	14%	14%	14%	14%	15%
Trade Draw from Zone 6 Catchment	2%	2%	2%	2%	2%
Trade Draw from Elsewhere	5%	5%	5%	5%	5%
TOTAL TRADE DRAW	100%	100%	100%	100%	100%

NOTES:

Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Scenario 1: Baseline Capacity

STAGE 5:

POTENTIAL COMPARISON GOODS TURNOVER (£ million):

	2001	2004	2008	2011	2016	CHANGE: 2001 - 2016	
						£m	%
DEFINED SHOPPING CENTRE							
WOKING							
Turnover from Zone 1 Catchment	£78.2	£89.5	£107.2	£122.7	£153.7		
Turnover from Zone 2 Catchment	£12.1	£13.8	£16.6	£19.0	£23.8		
Turnover from Zone 3 Catchment	£10.7	£12.3	£14.8	£16.9	£21.3		
Turnover from Zone 4 Catchment	£4.1	£4.7	£5.7	£6.6	£8.3		
Turnover from Zone 5 Catchment	£22.3	£25.6	£30.9	£35.6	£45.0		
Turnover from Zone 6 Catchment	£6.4	£7.3	£8.7	£9.9	£12.2		
Turnover from Elsewhere	£14.9	£17.0	£20.4	£23.4	£29.4		
TOTAL TURNOVER	£148.7	£170.4	£204.2	£234.0	£293.6	£144.84	97.4%
DISTRICT CENTRE							
WEST BYFLEET							
Turnover from Zone 1 Catchment	£2.0	£2.3	£2.7	£3.1	£3.9		
Turnover from Zone 2 Catchment	£5.4	£6.1	£7.3	£8.4	£10.5		
Turnover from Zone 3 Catchment	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Zone 4 Catchment	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Zone 5 Catchment	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Zone 6 Catchment	£0.0	£0.0	£0.0	£0.0	£0.0		
Turnover from Elsewhere	£0.4	£0.4	£0.5	£0.6	£0.8		
TOTAL TURNOVER	£7.7	£8.8	£10.6	£12.1	£15.2	£7.45	96.6%
ALL RETAIL WAREHOUSES							
Turnover from Zone 1 Catchment	£25.7	£29.5	£35.3	£40.4	£50.6		
Turnover from Zone 2 Catchment	£2.6	£3.0	£3.6	£4.2	£5.2		
Turnover from Zone 3 Catchment	£1.8	£2.0	£2.4	£2.8	£3.5		
Turnover from Zone 4 Catchment	£0.8	£0.9	£1.1	£1.2	£1.5		
Turnover from Zone 5 Catchment	£5.6	£6.4	£7.7	£8.9	£11.3		
Turnover from Zone 6 Catchment	£0.8	£0.9	£1.1	£1.2	£1.5		
Turnover from Elsewhere	£2.0	£2.2	£2.7	£3.1	£3.9		
TOTAL TURNOVER	£39.2	£45.0	£53.9	£61.8	£77.5	£38.23	97.4%

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Scenario 1: Baseline Capacity

STAGE 6: POTENTIAL AVERAGE COMPARISON GOODS TURNOVER TO FLOORSPACE RATIOS (£ per square metre):

		2001	2004	2008	2011	2016	CHANGE: 2001 - 2016
DEFINED SHOPPING CENTRE WOKING	Square Metres	£3,406	£3,902	£4,678	£5,359	£6,723	97.4%
	Square Feet	£316	£362	£435	£498	£625	97.4%
DISTRICT CENTRE WEST BYFLEET	Square Metres	£1,800	£2,060	£2,467	£2,824	£3,538	96.6%
	Square Feet	£167	£191	£229	£262	£329	96.6%
ALL RETAIL WAREHOUSES	Square Metres	£4,671	£5,352	£6,416	£7,350	£9,221	97.4%
	Square Feet	£434	£497	£596	£683	£857	97.4%

NOTES: (1) Calculated by dividing potential comparison goods turnover (Stage 5) by comparison goods sales area (Stage 2).

Woking Retail Capacity: Comparison Goods Shopping Only, 2001 - 2016:

Scenario 1: Baseline Capacity

STAGE 7: COMPARISON GOODS FLOORSPACE CAPACITY:

Assumes an annual growth 'efficiency' of: 1.5% for town centre floorspace
 Assumes an annual growth 'efficiency' of: 0.0% for out-of-town (retail warehouse) floorspace
 Assumes a net/gross floorspace ratio of: 75.0% for town centre floorspace
 Assumes a net/gross floorspace ratio of: 80.0% for out-of-town (retail warehouse) floorspace

		2001	2004	2008	2011	2016
DEFINED SHOPPING CENTRE WOKING	1 Derived Average Sales Density (sq.metres):	£3,406	£3,561	£3,780	£3,952	£4,258
	2 Derived Comparison Goods Turnover (£ million):	£148.7	£155.5	£165.0	£172.6	£185.9
	3 Residual Expenditure (£ million):	£0.00	£14.87	£39.20	£61.42	£107.63
DISTRICT CENTRE WEST BYFLEET	1 Derived Average Sales Density (sq.metres):	£1,800	£1,882	£1,998	£2,089	£2,250
	2 Derived Comparison Goods Turnover (£ million):	£7.7	£8.1	£8.6	£9.0	£9.6
	3 Residual Expenditure (£ million):	£0.00	£0.76	£2.01	£3.15	£5.52
ALL RETAIL WAREHOUSES	1 Derived Average Sales Density (sq.metres):	£4,671	£4,671	£4,671	£4,671	£4,671
	2 Derived Comparison Goods Turnover (£ million):	£39.2	£39.2	£39.2	£39.2	£39.2
	3 Residual Expenditure (£ million):	£0.00	£5.72	£14.66	£22.51	£38.23

NOTES: (1) Calculated in the base year by dividing potential comparison goods turnover (Stage 4) by comparison goods sales area (Stage 5). Figures in later years based on the base year with an allowance for annual growth as specified.
 (2) Turnover derived by multiplying the average sales density multiplied by the floorspace for the location
 (3) Potential over-trading is potential comparison goods turnover (Stage 5) minus derived comparison goods turnover (Stage 7).