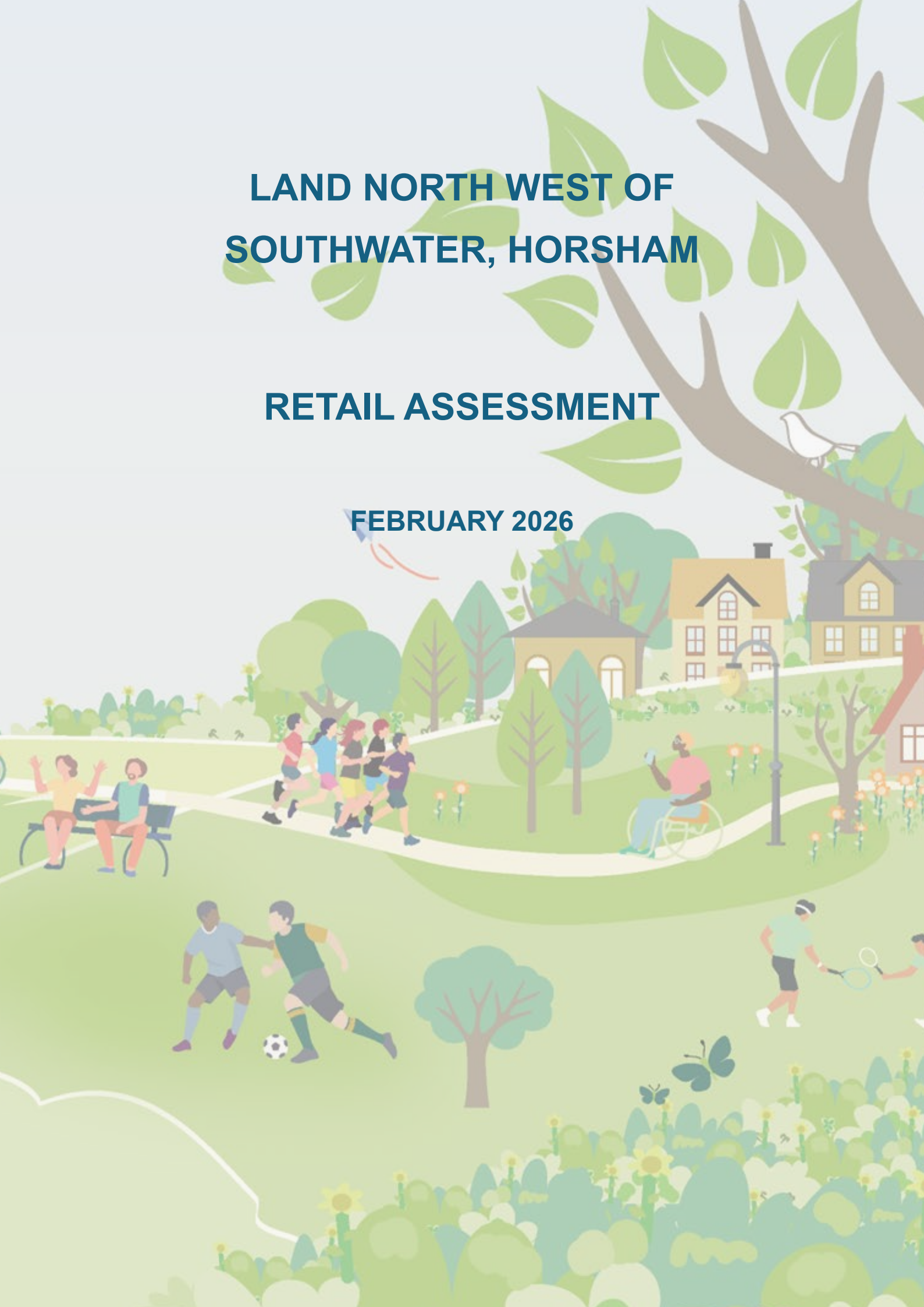


LAND NORTH WEST OF SOUTHWATER, HORSHAM

RETAIL ASSESSMENT

FEBRUARY 2026



Land North-West of Southwater

Retail Assessment

ON BEHALF OF BERKELEY STRATEGIC LAND LTD

February 2026

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1. Introduction

- 1.1 This Retail Assessment has been prepared by Nexus Planning in support of an outline planning application for a mixed-use development at Land North-West of Southwater. The Assessment considers the capacity for new floorspace, which would be generated by the newly resident population, as well as considering the impact of that floorspace on existing town centre facilities.
- 1.2 The description of development for the planning application is set out below:

“Outline planning application, with all matters reserved (except for primary access to the highway) for a phased development comprising: the demolition of existing buildings and the construction of residential dwellings (including affordable housing) (Use Classes C2 and C3); a mixed-use neighbourhood centre (Use Classes E and F); education facilities (Use Class F1(a)); business and employment floorspace (Use Classes B2, B8 and E(g)); redevelopment of existing agricultural buildings including construction of a building for community use (Use Classes E and F2); improvements to public rights of way; sports pitches; gypsy and traveller pitches/plots; public open space; landscaping, and associated infrastructure”.
- 1.3 The context for this report is set by the guidance contained within the National Planning Policy Framework (NPPF, 2025) and the policies of the Local Development Plan for Horsham District. There is also a made Neighbourhood Plan for Southwater (2021).
- 1.4 The draft Horsham District Local Plan 2023-2040 (Regulation 19) includes provision for a neighbourhood centre under the site allocation (Strategic Policy HA3). Draft policy specifies that *“A neighbourhood centre shall be provided, offering appropriate uses, including leisure, sports facilities, and retail whilst retaining Lintot Square as the primary centre of Southwater”.*
- 1.5 The NPPF sets out the Government’s guidance on ‘Ensuring the vitality of town centres’ at Paragraphs 90-95. Of most relevance to this Assessment, Paragraphs 87-88 set out a sequential test for main town centre use proposals, whilst Paragraph 90 sets out the range of considerations under an impact test. Paragraph 91 explains that planning applications which fail either to satisfy the sequential test, or which result in significant adverse impact on one or more of the considerations in Paragraph 90, should be refused.
- 1.6 This Assessment therefore addresses both of these key national tests. We are also cognisant of policies of the Horsham District Planning Framework (2015) and Southwater Neighbourhood Plan (2021) insofar as they are relevant to the application proposals. However, detailed consideration is given to these policies in the accompanying Planning Statement, also prepared by Nexus Planning.
- 1.7 In order to first set the context to the proposals, we provide a baseline assessment of existing main town centre uses within Southwater.

2. Southwater Village Centre

Introduction

- 2.1 This section of our assessment provides a concise analysis of the current vitality and viability of Southwater Village Centre to develop an informed understanding of the potential impact of the proposed development on the centre.
- 2.2 This assessment is based on site visits undertaken by Nexus Planning in September 2022. We have also utilised data from the Horsham Town Retail & Leisure Study (2017).

Southwater Village Centre

Overview

- 2.3 Southwater Village Centre is identified as a ‘secondary centre’ in the Horsham District Planning Framework (2015). The Village Centre is largely comprised of a purpose-built parade of shop units, known as Lintot Square. A small number of further units also extend along Worthing Road. As well as retail and service uses, the centre also hosts a number of community and residential uses.



Figure 2.3.1 Photos of Southwater Village Centre (September 2025)

Town Centre Composition

- 2.4 The table below compares the current retail composition of Southwater Village Centre, derived from Nexus site visits, and compares this with national averages as identified through Experian Goad Category Reports (November 2024).

Figure 2.4.1 Southwater Village Centre Composition

Unit Type	No. of Units	% of Units	% National Average
Convenience	2	9.5	9.4
Comparison	4	19	26.1
Retail Services	6	28.6	15.9
Leisure Services	8	38.1	26.6
Business and Financial Services	1	4.8	7.9
Vacant	0	0	14.1
Total	21	100	100

Source: Nexus Site Visit (September 2025) and Experian Goad Data (November 2024)

- 2.5 As with many Village Centres, Southwater is accented towards the provision of a wide range of service uses outside of convenience and comparison goods retailing. Compared to the cumulative national average of 50.4%, 71.5% of all units in Southwater Village are in service uses. The Centre has an above average representation in terms of retail services (e.g. health and beauty parlours, opticians etc) and leisure services. Leisure services are especially well represented, and include 4 takeaways, 2 pubs, a restaurant and a café.
- 2.6 The Centre has 6 units in convenience or comparison goods use (2x foodstores, a chemist, a gift shop, a charity shop and a pet shop). However, the units operated by Co-op, Budgens (including a Post Office) and Boots, in particular, are significant spatial components of the centre. The Co-op at 725 sq m gross, is the largest unit in the Centre.
- 2.7 There are no vacancies within the Centre, indicating that it is a popular and sought-after destination.
- 2.8 As well as retail service provision, the Centre also accommodates a veterinary surgery and Beeson House, which is a multi-functional building occupied by Southwater Parish Council, Southwater Library as well as many local groups and activities.

Accessibility

- 2.9 There are 96 car parking spaces at Lintot Square, including disabled parking bays. Spaces are provided for free for up to 2 hours.
- 2.10 There are 8 bus services connecting Southwater with the wider area. Services run to Crawley, Horsham and Worthing as well as a number of smaller local villages. Lintot Square is serviced by bus stops on both the western and eastern sides of Worthing Road to the rear of the Co-op store.
- 2.11 The village does not have a train station. The nearest stations are at Horsham to the north, Christs Hospital to the north-west and Billingshurst to the west. Southern Rail connect these stations to London Victoria and the south coast.

Perception of Safety

- 2.12 At the time of Nexus' site visit, the perception of safety was high, with plenty of people on the street providing natural surveillance.

2.13 Southwater is quoted by crimerate.co.uk as being “the safest small town in West Sussex” and having a 60% lower crime rate than the South East region as a whole. In the limited instances where crime has been reported around the Village Centre, it has historically centred around violence and sexual offences.

Environmental Quality

2.14 The largest part of the Village Centre is focused around Lintot Square, which has a high-quality environment. The centre comprises modern and architecturally interesting buildings, which have been designed in different heights, materials and colours. The buildings benefit from extensive public realm to their frontages and a number of well-marked zebra crossings, meaning there is little conflict with the central parking area. The public spaces are pleasant and efforts have been made to add interest through signposting, notice-boards and sculptures. There is plentiful public seating, lighting and CCTV is prominent. There is very little evidence of litter or graffiti.

Summary

2.15 Our health check indicates that Southwater Village Centre is both vital and viable, as demonstrated by its zero vacancy rate, high environmental quality and low levels of crime. These findings establish a robust baseline for the subsequent impact assessment presented in Section 3.

3. Capacity and Impact Assessment

Introduction

- 3.1 This section considers the likely extent of the newly resident population of the proposed development at Land North-West of Southwater, as well as other emerging residential developments in the village. We consider the expenditure which this population might generate in terms of convenience goods, comparison goods, and food and beverage spending. Utilising industry standard economic data, as well as the findings of the latest household telephone survey for the area as part of the Horsham Town Retail & Leisure Study (2017), we arrive at floorspace capacity forecasts which have informed our clients' proposals.
- 3.2 Building on this capacity exercise, we then go on to consider an impact assessment in accordance with the guidance set out in NPPF (2025) Paragraphs 94-95.
- 3.3 Our statistical tables are contained at **Appendix A**.

Catchment Area

- 3.4 The Catchment Area for a proposed development is the area within which it is expected to draw the majority of its trade. In order to help define the Catchment Area for the proposed development, we have drawn on the findings of the household telephone survey produced by NEMS Market Research as part of the aforementioned Horsham Town Retail & Leisure Study (2017). The survey contains relatively limited data, though does helpfully give an idea of the attraction to the Co-op store on Lintot Square. The data set out at Appendix 3 of that Study shows that the Co-op store is a popular store for 'top-up' food shopping trips (Question 6), though it draws the vast majority of its trade from a very localised catchment in and around Southwater Village itself (all visitors are shown as being from 'Zone 1').
- 3.5 We therefore consider it robust to assume that the Catchment Area for the proposed development should also be reflective of this localised trade draw. We have therefore set out a Catchment Area which is limited to 3 kilometres from Southwater. To allow a more granular assessment of capacity and impact, we have identified two bands for analysis; 0-1 kilometres from Southwater Village Centre, and 1-3 kilometres from Southwater Village Centre.
- 3.6 Our Catchment Area plan is shown at **Appendix B**.

Population

- 3.7 As prescribed in PPG, our assessment extends to a 10-year timeframe, which coincides with the end of the adopted Horsham Plan period to 2036. At integer dates of 2026, 2031 and 2036, we have set out population estimates for the 0-1 and 1-3 kilometre bands using Experian App Library data (2025 reports).
- 3.8 There are currently 7,908 residents within 1 kilometre of Southwater Village Centre and 13,172 residents within 3 kilometres. For the purposes of this assessment, we have made a robust assumption that this already resident population is held constant, as the vast majority of any population growth in the village and surrounding area is likely to come through the proposed development at Land North-West of Southwater or from the Broadacres development, which is currently under construction (LPA ref: DC/14/0590), and the recently permitted outline development on Horsham Golf Club (up to 800 new dwellings, LPA ref: DC/23/1178). There are also smaller developments which will further add to the resident population – for example LPA ref: DC/21/2180 for 73 homes at Shipley Road – but no allowance is made for such developments. In this way, the assessment is robust and is likely to understate actual population growth.

- 3.9 We then add to the already resident population, the likely population of the proposed developments at both the subject site, Broadacres and the Golf Club. This is shown in Table 1 at Appendix B. In keeping with the details submitted with the outline planning application for Land North-West of Southwater, we have assumed that 19% of the proposed dwellings will be built and occupied by 2031 (190 dwellings), and 69% by 2036 (690 dwellings).
- 3.10 The remaining 31% of dwellings are likely to be occupied after 2036 (310 dwellings) and would generate further expenditure towards supporting retail and leisure floorspace. However, for the purposes of a robust analysis within the horizon of the adopted Horsham Plan, we have not accounted for any capacity arising from this population.
- 3.11 Turning to Broadacres, approximately 66% of the development has already been completed and occupied, and the remaining 34% is forecast to be completed and occupied by 2031 (c. 200 dwellings).
- 3.12 The Horsham Golf Club permission allows for up to 800 new dwellings. Given that reserved matters have yet to be approved, we have assumed that a lower amount of 20% of dwellings would be occupied by 2031 (160 dwellings), and that 50% of dwellings would be occupied by 2036 (400 dwellings).
- 3.13 Utilising the latest data from the Office of National Statistics (July 2025 data release), we then assume that each dwelling has an average of 2.35 occupants.
- 3.14 The resultant population for the Catchment Area as a whole (0-3 kilometres) is therefore 13,172 at 2026, increasing to 15,014 at 2031 and 17,288 at 2036.

Convenience Goods Capacity

- 3.15 Tables 2-11 at Appendix A set out our assessment of convenience goods capacity.
- 3.16 Table 2 utilises expenditure forecasts for the Catchment Area derived from Experian AppLibrary data (2025 report). In keeping with standard methodology, base expenditure data excludes Special Forms of Trading in line with the 'adjusted' allowances at Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 22 ('ERPBN22', March 2025). This is expenditure which is likely to be derived principally from online platforms, and which is not picked from the shelves of existing foodstores. Having made this adjustment, per capita expenditure is then projected forward using forecast growth rates for convenience goods from Table 6 of ERPBN22. The results show that forecast per capital convenience expenditure per head within the Catchment Area is £2,855 at 2031, reducing slightly to £2,812 by 2036.
- 3.17 Table 3 then multiplies the population forecasts in Table 1 by the convenience per capita expenditures in Table 2 to provide forecasts for the total amount of convenience goods spending available within the Catchment Area. The total amount increases from £42.9m in 2031 to £48.6m in 2036.
- 3.18 Cumulatively, new housing in Southwater is therefore forecast to sustain a resident population that would have an annual convenience goods expenditure of £3.7m per annum by 2031, rising to £8.5m per annum by 2036.
- 3.19 Table 4 considers the market share which is likely to be attracted to Southwater (as a whole), from both existing residents and future residents. We have based our assessment on the results of Questions 1, 3 and 6 of the NEMS household telephone survey, which established where residents in and around Southwater shopped for their main and top-up food shopping. Based on those results, we have assumed that 40% of spending by residents within 1 kilometre of Southwater is carried out in the village itself, and 20% of spending by those within the 1-3 kilometre ring is carried out within the village itself. This table also assumes that a minimum of 40% of convenience goods spending at the proposed development, and at other new residential developments, will be carried out in the village.

- 3.20 In all cases, we have assumed that the majority of convenience goods spending is carried out in Horsham, with smaller market share amounts attributed to Billingshurst, Broadbridge Heath, Crawley and elsewhere beyond the Catchment Area.
- 3.21 This scenario is effectively a constant market share approach. It assumes no uplift in expenditure in the future, despite the addition of new convenience goods facilities under the application proposals.
- 3.22 Table 5 monetarises the constant market share approach set out in Table 4. The table shows that of the £38.4m of Catchment Area convenience goods expenditure forecast to be available at 2026, £12.3m is likely to be available to facilities in Southwater.
- 3.23 Table 6 then considers a scenario whereby there is a market share uplift resulting from the introduction of additional convenience floorspace as part of the proposed development. Under this scenario, we have assumed a modest increase in market share in each case. It is assumed that the market of existing residents will increase from 40% to 45% in the 0 to 1 kilometre band, and 20% to 25% in the 1-3 kilometre band. Given the proximity of the proposed residents to the proposed facilities, it is robust to assume that there would be a slightly higher uplift in market share for residents of the proposed development and Broadacres (from 40% to 50% in both cases).
- 3.24 Tables 7 and 8 then monetarise the amount of convenience goods expenditure which is likely to be available to Southwater under each scenario. Under the constant market share approach, the available expenditure totals £13.6m at 2031, increasing to £15.2m at 2036. Under the market share uplift scenario, available convenience expenditure increases from £15.8 in 2031 to £17.8m in 2036.
- 3.25 Table 9 then considers the amount of convenience goods spending which is likely to be attracted to existing facilities in Southwater. In order to calculate this we have obtained Valuation Office floorspace data for the existing Co-op and Budgens stores and multiplied this by national average sales densities for Co-op (derived from Global Data, 2025 edition) and Budgens (Nexus estimate based on comparable facilities). Our resultant assessment shows that the existing facilities are likely to have a combined turnover of around £5.8m per annum (Co-op £4.8m and Budgens £1.1m).
- 3.26 Table 10 then examines potential floorspace capacity available under the constant market share scenario. This is effectively an assessment of the minimum floorspace capacity likely to exist as it only accounts for the growth in expenditure over the period 2026-2036. All existing convenience goods spend in the Catchment Area is assumed to be consumed by existing retailers, and that turnover is assumed to grow in line with sales efficiencies set out in EPRBN22 (Table 4a). The result is surplus expenditure of £1.3m by 2031 and £3.0m by 2036. Applying then an assumed sales density of £7,500/sq m (grown in line with Table 4a of EPRBN22), this equates to floorspace capacity of up to 245 sq m gross by 2031 and 567 sq m gross by 2036. Equivalent net floorspace figures are also presented.
- 3.27 Table 11 examines a second scenario whereby the turnover of existing facilities is as per Table 9 (i.e. based on company average sales densities), and market shares are uplifted as a result of the introduction of new floorspace as part of the proposed development (as per Table 6). The amount of surplus expenditure under this scenario is significantly increased, equating to £10.0m by 2031 and £12.0m by 2036. Adopting the same assumed sales density as before, this is equivalent to convenience goods floorspace capacity for 1,902 sq m gross floorspace by 2031 and 2,298 sq m gross by 2036.

Comparison Goods Capacity

- 3.28 Tables 12-21 follow the same exercise for comparison goods market share and capacity. We do not repeat the same detailed methodological commentary here, but the headline methodological inputs can be summarised as follows:

- Table 13 - Experian MMG3 data shows comparison goods per capita spending within the Catchment Area of £3,357 at 2026, increasing to £3,703 by 2031 and £4,116 by 2036.
- Table 14 - Total comparison goods expenditure available within the Catchment Area is forecast at £55.6m in 2031, increasing to £71.2m by 2036.
- Tables 15-19 - Southwater Village has a current comparison goods market share of around £0.7m per annum. Under a constant market share approach, this is forecast to increase to £0.9m by 2031 and £1.1m by 2036. Under a market share uplift scenario, this is forecast to increase to £1.8m by 2031 and £2.3m by 2036.
- Table 20 - Under the constant market share approach there would be capacity for 26 sq m gross comparison goods floorspace by 2031 and 62 sq m gross by 2036.
- Table 21 - Under the market share uplift scenario, there would be capacity for 301 sq m gross floorspace by 2031 and 385 sq m gross floorspace by 2036.

Food and Beverage Capacity

3.29 Similarly, Tables 22-31 follow the same pattern for food and beverage market share and capacity. Headlines from the assessment are as follows:

- Table 23 - Experian MMG3 data shows food and beverage goods spending per capita within the Catchment Area of £1,978 at 2026, increasing to £2,032 by 2031 and £2,104 by 2036.
- Table 24 - Total food and beverage goods expenditure available within the Catchment Area is forecast at £26.1m in 2026, increasing to £29.7m by 2031 and £34.4m in 2036.
- Tables 25-29 - Southwater Village has a current food and beverage goods market share of around £3.4m per annum. Under a constant market share approach, this is forecast to increase to £3.9m by 2031 and £4.6m by 2036. Under a market share uplift scenario, this is forecast to increase to £5.4m by 2031 and £6.3m by 2036.
- Table 30 - Under the constant market share approach there would be capacity for 40 sq m gross food and beverage floorspace by 2031 and 128 sq m gross by 2036.
- Table 31 - Under the market share uplift scenario, there would be capacity for 337 sq m gross floorspace by 2031 and 455 sq m gross floorspace by 2036.

Proposed Development

3.30 The foregoing capacity assessment has identified the following summary capacities for new floorspace in support of the application proposals.

Figure 3.1: Summary Capacity Assessment

Type of Goods	Constant Market Share Basis (sq m gross)		Uplift Market Share Basis (sq m gross)	
	2031	2036	2031	2036
Convenience	245	567	1,902	2,298
Comparison	26	62	301	385
Food and Beverage	40	128	337	455
Total	311	757	2,540	3,138

3.31 Figure 3.1 summarises that there is forecast capacity for a range of uses in support of the new population for up to 3,138 sq m gross by 2036. This assumes that there is an uplift in market share attracted to Southwater as a result of any new floorspace, which we consider a robust proposition.

3.32 In light of the foregoing, and sitting comfortably within the identified capacity, the applicant is proposing Class E floorspace within these goods categories to comprise up to 1,500 sq m gross internal area. Applying a standard assumption that gross to net floorspace ratios would be 70%, this would result in total net sales area of 1,050 sq m net. The precise details of the mix will be subject to reserved matters submissions at a later date, but for now we have modelled our ensuing impact assessment on the basis of a split as follows:

- Convenience goods of 700 sq m gross (490 sq m net)
- Comparison goods of 200 sq m gross (140 sq m net)
- Food and beverage floorspace of 450 sq m gross (315 sq m net)
- Other service uses of 150 sq m gross (105 sq m net).

Impact Assessment

3.33 Paragraph 94 of the NPPF (2025) suggests that an impact assessment is required for locations outside town centres where the floorspace proposed is over 2,500 sq m gross. The floorspace proposed here is some way short of that and so an impact assessment is not necessitated. Notwithstanding, we have produced a ‘proportionate’ impact assessment in order to provide comfort on the broad issue of impact.

3.34 Tables 32-34 at Appendix A set out the culminating impact assessment. In the case of each goods category, we have utilised the market share uplift scenario as the basis for our assessment and considered whether forecast growth in expenditure alone is sufficient to support the floorspace proposed. This is also after taking account of sales efficiency increased for existing retailers.

3.35 The expected turnover of the proposed facilities at 2031 is as follows:

- Convenience goods - £3.7m per annum

- Comparison goods - £0.6m per annum
- Food and beverage - £1.6m per annum

- 3.36 The results show that there is an expenditure surplus in each goods category from 2031 onwards after accounting for the proposed development, and sufficient expenditure growth in each case to support the proposed floorspace at the outset of the development with increasing expenditure surplus to 2036. These figures therefore suggest that there is unlikely to be any notable impact on existing retailers in Southwater as the proposed units will effectively feed off their own population. As we have established in Section 2, it is also notable that the existing village centre is vital and viable, with no on-going issue of vacancy or any other health-check concern.
- 3.37 Notably, our assessment assumes that housing delivery will be phased. The figures also therefore suggest that it is acceptable to bring forward retail components of the development as part of the early phases. Indeed, as the later stages of the residential scheme are built out there will be increasing expenditure available, not only to occupiers of the proposed development, but also to existing stores in Southwater Village.
- 3.38 We have also considered whether the proposals would result in any impact on any existing, committed and planned public and private investment in the Catchment Area (i.e. Southwater Village) and we are not aware of any such impact. There is a very small retail component proposed as part of the Horsham Golf Club proposals (modelled at 100 sq m gross in the supporting Environmental Statement), but this proposal would not be within a protected centre. Moreover, our analysis has shown that there is sufficient expenditure headroom to also accommodate this proposed floorspace.
- 3.39 Overall, the proposals will support a large proposed residential population at a location which is within easy walking distance to that population. If the proposed floorspace were not to be provided, then it is likely that unsustainable travel patterns would result, with increased necessity for car-borne shopping trips. Clear expenditure headroom will exist to support the proposals, arising from the new resident population, meaning that the development is likely to be self-sufficient in that regard and unlikely to result in any undue impact on existing facilities.
- 3.40 In further support, having undertaken our assessment of vitality and viability in Section 2, we consider that Southwater Village Centre is demonstrably healthy in all aspects of its health-check.
- 3.41 In conclusion, having regard to the test set out at Paragraph 94 of the NPPF, we consider there to be no 'significant adverse impacts' likely to arise from the proposals.

4. Sequential Assessment

- 4.1 Paragraph 91 of the NPPF (2025) explains that *“Local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered”*.
- 4.2 Whilst the subject site is shown as being allocated for mixed uses, including the provision of a neighbourhood centre, in the draft Horsham District Local Plan 2023/2040 (Regulation 19), it is not within an existing centre nor in accordance with an adopted up-to-date plan. Accordingly, for now, the application site is beyond 300m from the edge of Southwater Village Centre and therefore it is classified as an out of centre site under the sequential test.
- 4.3 In such circumstances National Planning Policy Guidance (NPPG) suggests that certain main town centre uses might have particular market and locational requirements, which mean that they may only be accommodated in specific locations.
- 4.4 The proposed retail floorspace will have a relatively localised Catchment Area, as defined previously under our capacity and impact assessment and as illustrated at **Appendix B**. As we have demonstrated in that same assessment, the proposed retail facilities will serve a very localised catchment population and will primarily be sustained by the newly resident population. There exists, therefore, clear locational circumstances for the proposed facilities to be located at the heart of the new development, as per the draft Plan allocation.
- 4.5 Notwithstanding, we have also looked at sites in and on the edge of Southwater Village Centre, and we are not aware of any site which would support the floorspace proposed under the application development (1,600 sq m gross), even allowing for flexibility. As we have discussed under Section 2 of this report Southwater Village Centre is a compact, vital and viable centre, which had no vacancies at the time of our assessment.

5. Conclusions

- 5.1 In light of the foregoing, the conclusions of this report are that the application proposals for retail floorspace in support of the proposed residential development at Land North-West of Southwater are compliant with the tests set out in the NPPF.
- 5.2 At the outset, we identify in Section 1 that the provision of a neighbourhood centre on this site is a core part of the emerging site allocation under Strategic Policy HA3. In practice, the site is highly likely to emerge as an identified centre within the retail hierarchy in due course, thereby meaning the impact and sequential tests of the NPPF are not engaged. However, this Plan is not yet adopted and so this Assessment addresses the appropriate tests of the development plan.
- 5.3 Accordingly, in Section 2, it is demonstrated that the only centre within the identified Catchment Area - Southwater Village Centre - is a vital and viable centre, exemplified by zero current vacancies and a high-quality environment. Set alongside this, we conduct in Section 3 a robust estimation of the capacity for new retail floorspace in support of the new dwellings proposed on the subject site. The proposals have been guided by that capacity assessment and are demonstrably 'right-sized' for the population that they will serve.
- 5.4 In doing so, the accompanying impact assessment demonstrates that there is unlikely to be any undue impact on existing retailers within the Catchment Area and especially in Southwater Village Centre. Moreover, we are not aware of any planned investment which these proposals would prejudice.
- 5.5 Finally, as an out of centre site, we have considered the proposals against the requirements of the sequential test. We consider that there are location specific reasons for the retail floorspace to be centred at the heart of the new development (i.e. to provide day-to-day facilities within easy walking distance of the new resident population, thereby reducing the requirement to undertake car-borne shopping trips further afield).
- 5.6 Accordingly, we consider that the application proposals will have none of the characteristics which would warrant refusal under Paragraph 95 of the NPPF (2025), and that the proposals should therefore be considered acceptable in this regard.

Appendix A

Table 1: Catchment Area - Population Trajectory

	2026	2031	2036
Southwater existing - 0 to 1 km	7,908	8,253	8,621
Southwater existing - 1 to 3 km	5,264	5,468	5,635
Southwater proposed - Broadacres Permission	0	470	470
Southwater proposed - Horsham Golf Club Permission	0	376	940
Southwater proposed - Proposed Urban Extension	0	447	1,622
Total	13,172	15,014	17,288

Notes:

- a. Areas based on the the Catchment Area plan at Appendix B
- b. Base population for Southwater 0-1 km and 1-3 km derived from Experian AppLibrary data (2025 report).
- c. Broadacres scheme assumes that 200 dwellings are remaining to be built and occupied by 2031.
- d. Horsham Golf Club scheme assumes that 800 dwellings require reserved matters approval and that 20% are occupied by 2031 and 50% by 2036.
- e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.
- f. Assumes household occupancy of 2.35 persons (UK average, ONS, July 2025 data release).

Table 2: Catchment Area - Convenience Goods Expenditure per capita (£)

	2026	2031	2036
Southwater area	2,918	2,855	2,812

Notes:

- a. Per capita expenditure derived from Experian AppLibrary data (2025 report)
- b. Per capita expenditure projected forward using forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 22 (2025)
- c. Base expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 22 (2025)

Table 3: Catchment Area - Total Convenience Goods Expenditure (£m)

	2026	2031	2036
Southwater existing - 0 to 1 km	23.1	23.6	24.2
Southwater existing - 1 to 3 km	15.4	15.6	15.8
Southwater proposed - Broadacres Permission	0.0	1.3	1.3
Southwater proposed - Horsham Golf Club Permission	0.0	1.1	2.6
Southwater proposed - Proposed Urban Extension	0.0	1.3	4.6
Total	38.4	42.9	48.6

Notes:

- a. Table 1 x Table 2

2023 Prices

Table 4: Convenience Goods Market Shares - Catchment Area, 2026 (%)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater Village	40%	20%	40%	40%
Horsham	50%	65%	50%	50%
Billingshurst	2%	5%	2%	2%
Broadbridge Heath	1%	2%	1%	1%
Crawley	2%	3%	2%	2%
Other	5%	5%	5%	5%
Total	100%	100%	100%	100%

Notes:

a. Convenience goods market shares modelled on the results of the Horsham Town Retail & Leisure Study 2017 (see Questions 1, 3 and 6 at Appendix 3). Southwater is located within Zone 1 of that Study.

Table 5: Convenience Goods Expenditure Patterns - Catchment Area, 2026 (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
Southwater Village	£9.2	£3.1	£0.0	£0.0	£12.3
Horsham	£11.5	£10.0	£0.0	£0.0	£21.5
Billingshurst	£0.5	£0.8	£0.0	£0.0	£1.2
Broadbridge Heath	£0.2	£0.3	£0.0	£0.0	£0.5
Crawley	£0.5	£0.5	£0.0	£0.0	£0.9
Other	£1.2	£0.8	£0.0	£0.0	£1.9
Total	£23.1	£15.4	£0.0	£0.0	£38.4

Notes:

a. Table 3 x Table 4 for 2026

Table 6: Potential Convenience Goods Market Share Uplift (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater (with new community hub)	45%	25%	50%	50%

2023 Prices

Table 7: Catchment Area - Future Convenience Goods Expenditure Patterns - Constant Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£9.2	£3.1	£0.0	£0.0	£12.3
2031	£9.4	£3.1	£0.5	£0.5	£13.6
2036	£9.7	£3.2	£0.5	£1.8	£15.2

Notes:

a. Table 3 x Table 4 for 2026-2036

Table 8: Catchment Area - Future Convenience Goods Expenditure Patterns - Uplifted Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£9.2	£3.1	£0.0	£0.0	£12.3
2031	£10.6	£3.9	£0.7	£0.6	£15.8
2036	£10.9	£4.0	£0.7	£2.3	£17.8

e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.

Notes:

a. Table 3 x Table 6 for 2026-2036

Table 9: Catchment Area - Existing Convenience Goods Turnover, 2026 (£m)

Store	Gross Floorspace (sq m)	Sales Floorspace (sq m)	Convenience Floorspace (sq m)	Sales Density (£ per sq m)	Total Turnover (£m)
Co-op, Southwater	725	508	450	£10,605	£4.8
Budgens, Southwater	150	105	105	£10,000	£1.1
Total	875	613	555		£5.8

Notes:

a. Gross and net floorspaces from Valuation Office

b. Convenience floorspace based on Nexus observations

c. Sales density for Co-op taken from Global Data sales densities (2025 edition). Sales density for Budgens is a Nexus estimate based on comparable retailers.

2023 Prices

Table 10: Catchment Area - Convenience Goods Floorspace Capacity - Constant Market Share (£m)

	2026	2031	2036
Available Expenditure (£m)	£12.3	£13.6	£15.2
Turnover of Existing Facilities (£m)	£12.3	£12.3	£12.3
Surplus Expenditure (£m)	£0.0	£1.3	£3.0
Assumed Sales Density (£/sq m)	£7,500	£7,500	£7,470
Floorspace Capacity (sq m net)	0	172	397
Floorspace Capacity (sq m gross)	0	245	567

Notes:

- a. Available expenditure taken from Table 5 and Table 7
- b. Turnover of existing facilities assumed to be in equilibrium with available expenditure under the constant market share scenario.
- c. Assumed sales density is a Nexus estimate based on the known turnovers of comparable retailers (£7,500/sq m @ 2023 prices)
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.
- e. Floorspace requirement (sq m gross) assumes that net floorspace is 70% of gross floorspace.

Table 11: Catchment Area - Convenience Goods Floorspace Capacity - Uplifted Market Share and Base Year Surplus (£m)

	2026	2031	2036
Available Expenditure (£m)	£12.3	£15.8	£17.8
Turnover of Existing Facilities (£m)	£5.8	£5.8	£5.8
Surplus Expenditure (£m)	£6.5	£10.0	£12.0
Assumed Sales Density (£/sq m)	£7,500	£7,500	£7,470
Floorspace Capacity (sq m net)	864	1,331	1,608
Floorspace Capacity (sq m gross)	1,234	1,902	2,298

Notes:

- a. Available expenditure taken from Table 5 and Table 8
- b. Turnover of existing facilities taken from Table 9 and grown year on year by sales density estimates from Table 4b of Experian Retail Planner Briefing Note 22.
- c. Assumed sales density is a Nexus estimate based on the known turnovers of comparable retailers.
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.
- e. Floorspace requirement (sq m gross) assumes that net floorspace is 70% of gross floorspace.

2023 Prices

Table 12: Catchment Area - Population Trajectory

	2026	2031	2036
Southwater existing - 0 to 1 km	7,908	8,253	8,621
Southwater existing - 1 to 3 km	5,264	5,468	5,635
Southwater proposed - Broadacres Permission	0	470	470
Southwater proposed - Horsham Golf Club Permission	0	376	940
Southwater proposed - Proposed Urban Extension	0	447	1,622
Total	13,172	15,014	17,288

Notes:

- a. Areas based on the the Catchment Area plan at Appendix B
- b. Base population for Southwater 0-1 km and 1-3 km derived from Experian AppLibrary data (2025 report).
- c. Broadacres scheme assumes that 200 dwellings are remaining to be built and occupied by 2031.
- d. Horsham Golf Club scheme assumes that 800 dwellings require reserved matters approval and that 20% are occupied by 2031 and 50% by 2036.
- e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.
- f. Assumes household occupancy of 2.35 persons (UK average, ONS, July 2025 data release).

Table 13: Catchment Area - Comparison Goods Expenditure per capita (£)

	2026	2031	2036
Southwater area	3,357	3,703	4,116

Notes:

- a. Per capita expenditure derived from Experian AppLibrary data (2025 report)
- b. Per capita expenditure projected forward using forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 22 (2025)
- c. Base expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 22 (2025)

Table 14: Catchment Area - Total Comparison Goods Expenditure (£m)

	2026	2031	2036
Southwater existing - 0 to 1 km	26.5	30.6	35.5
Southwater existing - 1 to 3 km	17.7	20.2	23.2
Southwater proposed - Broadacres Permission	0.0	1.7	1.9
Southwater proposed - Horsham Golf Club Permission	0.0	1.4	3.9
Southwater proposed - Proposed Urban Extension	0.0	1.7	6.7
Total	44.2	55.6	71.2

Notes:

- a. Table 12 x Table 13

2023 Prices

Table 15: Comparison Goods Market Shares - Catchment Area, 2026 (%)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater Village	2%	1%	2%	2%
Horsham	85%	86%	85%	85%
Billingshurst	2%	2%	2%	2%
Broadbridge Heath	2%	2%	2%	2%
Crawley	7%	7%	7%	7%
Other	2%	2%	2%	2%
Total	100%	100%	100%	44650%

Notes:

a. Comparison goods market shares modelled on the results of the Horsham Town Retail & Leisure Study 2017 (see Questions 8-15 at Appendix 3). Southwater is located within Zone 1 of that Study.

Table 16: Comparison Goods Expenditure Patterns - Catchment Area, 2026 (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
Southwater Village	£0.6	£0.1	£0.0	£0.0	£0.7
Horsham	£25.2	£12.2	£0.0	£0.0	£37.4
Billingshurst	£0.6	£0.3	£0.0	£0.0	£0.9
Broadbridge Heath	£0.6	£0.3	£0.0	£0.0	£0.9
Crawley	£2.1	£1.0	£0.0	£0.0	£3.1
Other	£0.6	£0.3	£0.0	£0.0	£0.9
Total	£29.6	£14.2	£0.0	£0.0	£43.9

Notes:

a. Table 15 x Table 16 for 2026

Table 17: Potential Comparison Goods Market Share Uplift (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater (with new community hub)	4%	2%	4%	5%

2023 Prices

Table 18: Catchment Area - Future Comparison Goods Expenditure Patterns - Constant Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£0.6	£0.1	£0.0	£0.0	£0.7
2031	£0.6	£0.2	£0.0	£0.0	£0.9
2036	£0.7	£0.2	£0.0	£0.1	£1.1

Notes:

a. Table 3 x Table 4 for 2026-2036

Table 19: Catchment Area - Future Comparison Goods Expenditure Patterns - Uplifted Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£0.6	£0.1	£0.0	£0.0	£0.7
2031	£1.2	£0.4	£0.1	£0.1	£1.8
2036	£1.4	£0.5	£0.1	£0.3	£2.3

e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.

Notes:

a. Table 3 x Table 6 for 2026-2036

2023 Prices

Table 20: Catchment Area - Comparison Goods Floorspace Capacity - Constant Market Share (£m)

	2026	2031	2036
Available Expenditure (£m)	£0.7	£0.9	£1.1
Turnover of Existing Facilities (£m)	£0.7	£0.8	£0.9
Surplus Expenditure (£m)	£0.0	£0.1	£0.2
Assumed Sales Density (£/sq m)	£4,056	£4,544	£5,091
Floorspace Requirement (sq m net)	0	18	43
Floorspace requirement (sq m gross)	1	26	62

Notes:

- a. Available expenditure taken from Table 16 and Table 18
- b. Turnover of existing facilities assumed to be in equilibrium and grown year on year by sales density estimates from Table 4a of Experian Retail Planner Briefing Note 22.
- c. Assumed sales density is a Nexus estimate based on the known turnovers of comparable retailers (£4,000/sq m @2023 prices).
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.
- e. Floorspace requirement (sq m gross) assumes that net floorspace is 70% of gross floorspace.

Table 21: Catchment Area - Comparison Goods Floorspace Capacity - Uplifted Market Share and Base Year Surplus (£m)

	2026	2031	2036
Available Expenditure (£m)	£0.7	£1.8	£2.3
Turnover of Existing Facilities (£m)	£0.7	£0.8	£0.9
Surplus Expenditure (£m)	£0.0	£1.0	£1.4
Assumed Sales Density (£/sq m)	£4,056	£4,544	£5,091
Floorspace Requirement (sq m net)	0	211	270
Floorspace requirement (sq m gross)	1	301	385

Notes:

- a. Available expenditure taken from Table 16 and Table 19
- b. Turnover of existing facilities assumed to be in equilibrium and grown year on year by sales density estimates from Table 4a of Experian Retail Planner Briefing Note 22.
- c. Assumed sales density is a Nexus estimate based on the known turnovers of comparable retailers.
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.
- e. Floorspace requirement (sq m gross) assumes that net floorspace is 70% of gross floorspace.

2023 Prices

Table 22: Catchment Area - Population Trajectory

	2026	2031	2036
Southwater existing - 0 to 1 km	7,908	8,253	8,621
Southwater existing - 1 to 3 km	5,264	5,468	5,635
Southwater proposed - Broadacres Permission	0	470	470
Southwater proposed - Horsham Golf Club Permission	0	376	940
Southwater proposed - Proposed Urban Extension	0	447	1,622
Total	13,172	15,014	17,288

Notes:

- a. Areas based on the the Catchment Area plan at Appendix B
- b. Base population for Southwater 0-1 km and 1-3 km derived from Experian AppLibrary data (2025 report).
- c. Broadacres scheme assumes that 200 dwellings are remaining to be built and occupied by 2031.
- d. Horsham Golf Club scheme assumes that 800 dwellings require reserved matters approval and that 20% are occupied by 2031 and 50% by 2036.
- e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.
- f. Assumes household occupancy of 2.35 persons (UK average, ONS, July 2025 data release).

Table 23: Catchment Area - Food and Beverage Expenditure per capita (£)

	2026	2031	2036
Southwater area	1,978	2,032	2,104

Notes:

- a. Per capita expenditure derived from Experian AppLibrary data (2025 report)
- b. Per capita expenditure projected forward using forecast growth rates taken from Table 1a of Experian Retail Planner Briefing Note 22 (2025)

Table 24: Catchment Area - Total Food and Beverage Goods Expenditure (£m)

	2026	2031	2036
Southwater existing - 0 to 1 km	15.6	16.8	18.1
Southwater existing - 1 to 3 km	10.4	11.1	11.9
Southwater proposed - Broadacres Permission	0.0	1.0	1.0
Southwater proposed - Proposed Urban Extension	0.0	0.9	3.4
Total	26.1	29.7	34.4

Notes:

- a. Table 22 x Table 23

2023 Prices

Land North West of Southwater - Community Hub Capacity Assessment
Nexus Planning

Table 25: Food and Beverage Market Shares - Catchment Area, 2026 (%)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater Village	15%	10%	15%	15%
Horsham	80%	85%	80%	80%
Billingshurst	1%	1%	1%	1%
Broadbridge Heath	1%	1%	1%	1%
Crawley	1%	1%	1%	1%
Other	2%	2%	2%	2%
Total	100%	100%	100%	100%

Notes:

a. Based on Nexus assessment of existing provision within the catchment area.

Table 26: Food and Beverage Expenditure Patterns - Catchment Area, 2026 (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
Southwater Village	£2.3	£1.0	£0.0	£0.0	£3.4
Horsham	£12.5	£8.9	£0.0	£0.0	£21.4
Billingshurst	£0.2	£0.1	£0.0	£0.0	£0.3
Broadbridge Heath	£0.2	£0.1	£0.0	£0.0	£0.3
Crawley	£0.2	£0.1	£0.0	£0.0	£0.3
Other	£0.3	£0.2	£0.0	£0.0	£0.5
Total	£15.6	£10.4	£0.0	£0.0	£26.1

Notes:

a. Table 24 x Table 25 for 2026

Table 27: Potential Food and Beverage Goods Market Share Uplift (£m)

Centre	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension
Southwater (with new community hub)	20%	15%	20%	20%

2023 Prices

Table 28: Catchment Area - Future Food and Beverage Expenditure Patterns - Constant Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£2.3	£1.0	£0.0	£0.0	£3.4
2031	£2.5	£1.1	£0.1	£0.1	£3.9
2036	£2.7	£1.2	£0.1	£0.5	£4.6

Notes:

a. Table 24 x Table 25 for 2026-2036

Table 29: Catchment Area - Future Food and Beverage Expenditure Patterns - Uplifted Market Share (£m)

	Southwater existing 0 to 1 km	Southwater existing 1 to 3 km	Southwater Proposed Broadacres Permission	Southwater Proposed Urban Extension	Total
2026	£2.3	£1.0	£0.0	£0.0	£3.4
2031	£3.4	£1.7	£0.2	£0.2	£5.4
2036	£3.6	£1.8	£0.2	£0.7	£6.3

e. New proposed urban extension assumes that 19% of dwellings are occupied before 2031, and that 69% of dwellings are occupied by 2036.

Notes:

a. Table 24 x Table 27 for 2026-2036

2023 Prices

Table 30: Catchment Area - Food and Beverage Floorspace Capacity - Constant Market Share (£m)

	2026	2031	2036
Available Expenditure (£m)	£3.4	£3.9	£4.6
Turnover of Existing Facilities (£m)	£3.5	£3.7	£3.9
Surplus Expenditure (£m)	-£0.1	£0.2	£0.7
Assumed Sales Density (£/sq m)	£4,742	£5,008	£5,264
Floorspace Requirement (sq m gross)	-29	40	128

Notes:

- a. Available expenditure taken from Table 26 and Table 28
- b. Turnover of existing facilities assumed to be in equilibrium and grown year on year by sales density estimates of 1% per annum (a Nexus estimate)
- c. Assumed sales density is a Nexus estimate (£5,000/sq m @ 2023 prices). Projected forward using RPN22 (Leisure).
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.

Table 31: Catchment Area - Food and Beverage Floorspace Capacity - Uplifted Market Share and Base Year Surplus (£m)

	2026	2031	2036
Available Expenditure (£m)	£3.4	£5.4	£6.3
Turnover of Existing Facilities (£m)	£3.5	£3.7	£3.9
Surplus Expenditure (£m)	-£0.1	£1.7	£2.4
Assumed Sales Density (£/sq m)	£4,742	£5,008	£5,264
Floorspace Requirement (sq m gross)	-29	337	455

Notes:

- a. Available expenditure taken from Table 26 and Table 29
- b. Turnover of existing facilities assumed to be in equilibrium and grown year on year by sales density estimates of 1% per annum (a Nexus estimate)
- c. Assumed sales density is a Nexus estimate (£5,000/sq m @ 2023 prices). Projected forward using RPN22 (Leisure).
- d. Floorspace requirement (sq m net) is surplus expenditure x assumed sales density.

2023 Prices

Land North West of Southwater - Community Hub Capacity Assessment

Nexus Planning

Table 32: Convenience Goods Impact

	2026	2031	2036
Available Expenditure (£m)	£12.3	£15.8	£17.8
Benchmark turnover of existing facilities (£m)	£5.8	£5.8	£5.8
Turnover of new floorspace (£m)	£0.0	£3.7	£3.7
Expenditure surplus/deficit	£6.5	£6.3	£8.4
% under/over trading	52.7	39.9	46.9

Notes

Available expenditure and benchmark turnover taken from Table 11

Turnover of new floorspace equates to 490 sq m net x an assumed sales density of £7,500/sq m @ 2023

Sales density assumed to grow in line with sales density estimates from Table 4b of Experian Retail Planner Briefing Note 22

Table 33: Comparison Goods Impact

	2026	2031	2036
Available Expenditure (£m)	£0.7	£1.8	£2.3
Benchmark turnover of existing facilities (£m)	£0.7	£0.8	£0.9
Turnover of new floorspace (£m)	£0.0	£0.6	£0.7
Expenditure surplus/deficit	£0.0	£0.3	£0.7
% under/over trading	0.2	18.1	28.8

Notes

Available expenditure and benchmark turnover taken from Table 11

Turnover of new floorspace equates to 140 sq m net x an assumed sales density of £4,000/sq m @ 2023.

Sales density assumed to grow in line with sales density estimates from Table 4b of Experian Retail Planner Briefing Note 22

Table 34: Food and Beverage Impact

	2026	2031	2036
Available Expenditure (£m)	£3.4	£5.4	£6.3
Benchmark turnover of existing facilities (£m)	£3.5	£3.7	£3.9
Turnover of new floorspace (£m)	£0.0	£1.6	£1.7
Expenditure surplus/deficit	-£0.1	£0.1	£0.7
% under/over trading	-4.1	2.1	11.7

Notes

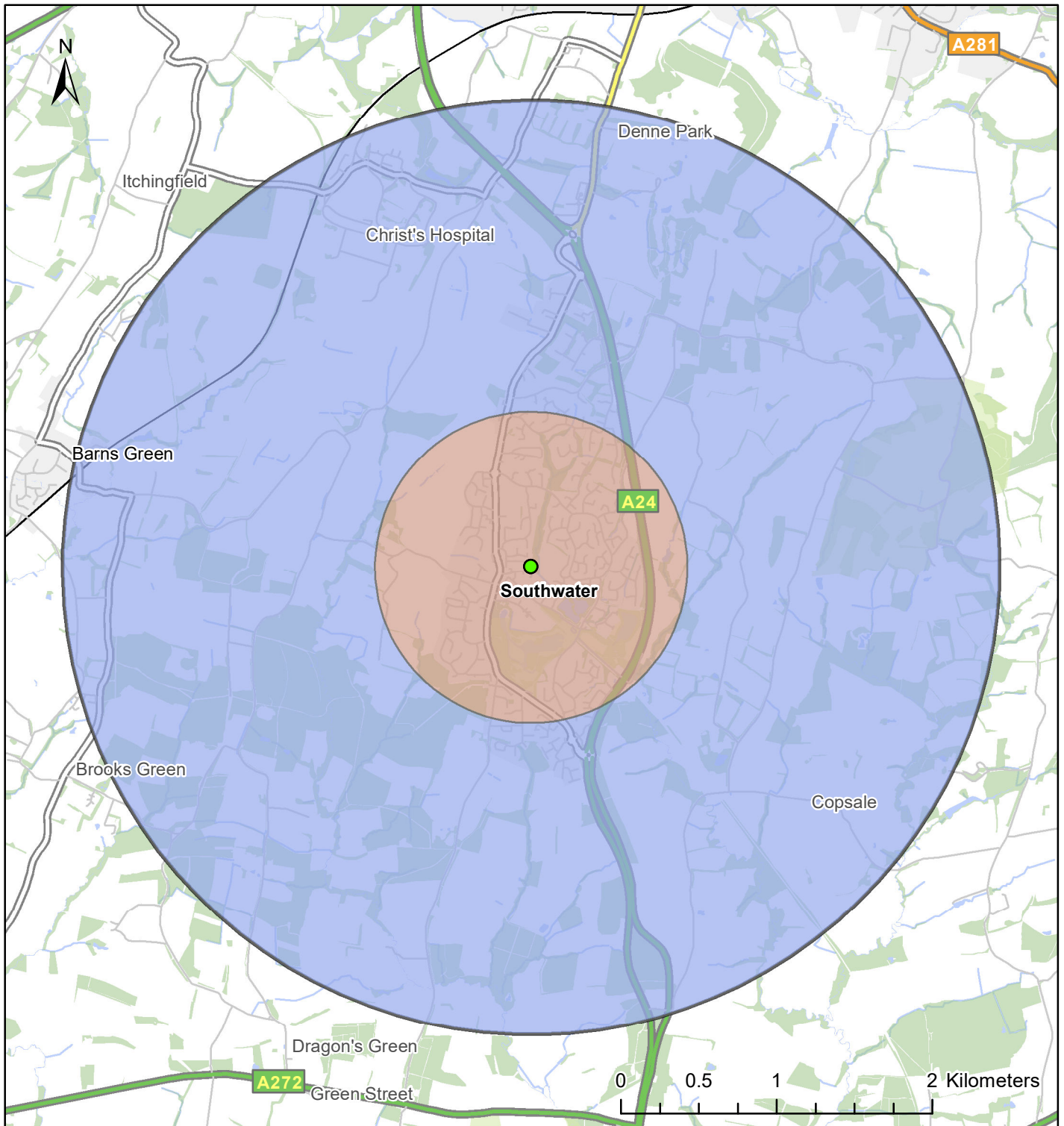
Available expenditure and benchmark turnover taken from Table 11

Turnover of new floorspace equates to 315 sq m net x an assumed sales density of £5,000/sq m @ 2023.




Sales density assumed to grow in line with sales density estimates from Table 4b of Experian Retail Planner Briefing Note 22.

Appendix B

Southwater Urban Extension Catchment Area



Legend

-  Southwater Urban Extension
-  Southwater - 0 to 1 km
-  Southwater - 1 to 3 km

