

TOWN CENTRE HEALTH CHECK AND RETAIL ASSESSMENT 2008 TO 2026 ELLESMERE, MARKET DRAYTON, WEM & WHITCHURCH

NOVEMBER 2008



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White
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RETAIL AND LEISURE STUDY

For the northern area of Shropshire comprising
Ellesmere, Market Drayton, Wem and
Whitchurch

White Young Green Planning and Design

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thinking beyond construction

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1.0 SCOPE AND PURPOSE OF THE STUDY

- 1.1 White Young Green Planning (WYG) has prepared this Study to advise upon the future retail and leisure strategy for the network of centres in the North Shropshire area. The principal centres within the Study area are the towns of: Ellesmere; Market Drayton; Wem; and Whitchurch.
- 1.2 North Shropshire District Council instructed WYG to complete the Study, but it is completed having regard to the fact that North Shropshire District will become part of a new Shropshire Unitary Authority (comprising the current Bridgnorth, Oswestry, Shrewsbury and Atcham, North Shropshire and South Shropshire authority areas) in April 2009. The five authorities are working towards unifying planning policy across the Shropshire unitary authority area and although this Study relates principally to the four centres in the North Shropshire area, it has regard to the retail influence on this area of centres elsewhere in Shropshire. It uses a methodology and is written to allow its future updating and incorporation into the retail and leisure strategy for the Shropshire unitary authority area.
- 1.3 The Study assesses the vitality and viability of the Study Area's four town centres and the future retail and leisure need in these centres over the period 2008 to 2026. It has regard to the advice on such assessments set out in Planning Policy Statement 6 (2005) 'Planning for Town Centres'. The need for additional retail floorspace is assessed quantitatively and qualitatively, whereas the need for additional leisure provision is assessed on a qualitative basis. A quantitative assessment of leisure need, particularly in a rural area, is very difficult to complete with any robustness.
- 1.4 The Study includes an in-depth analysis of the retail and leisure provision in the four centres, assessment of the extent to which the centres are meeting the retail and leisure needs of the local area population and the role of the centres in the local shopping network and the sub-regional shopping hierarchy.
- 1.5 The findings of the Study will help inform the retail policies of the single Local Development Document for Shropshire for the North Shropshire area following the Government's decision to merge the county, borough and district councils in Shropshire to form a single unitary council. This study identifies any need to plan for new retail floorspace over the period to 2028 within the North Shropshire area. The Study is a material consideration in determining planning applications for retail and leisure development within the North Shropshire administrative area.
- 1.6 The purpose of this Study is to:

- Assess the quantitative 'need', or expenditure capacity, for further convenience and comparison retail floorspace in the four centres. In this regard in the first instance, the retail need should be met in the defined primary shopping areas of the town centres, and then elsewhere in the town centres;
- Assess any qualitative deficiencies that exist in retail and leisure provision in North Shropshire;
- Assess the vitality and viability of the four town centres; and
- From the above, make broad recommendations on appropriate retail and leisure strategies, including considering the ability of commitments, allocations and sites available or likely to come forward to meet the identified capacity for additional floorspace.

2 CURRENT AND EMERGING RETAIL AND LEISURE TRENDS

Introduction

- 2.1 The commercial retail and leisure property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment of town centres, through to the emergence of out of centre retail and leisure facilities, retail and leisure warehouse parks and out-of-town regional shopping malls. In rural areas such as North Shropshire, town and village centres and local shopping facilities have declined consistently in the face of increased mobility, increasing polarisation towards high-order centres and the growth of out of town retail developments.
- 2.2 During the past two decades, the retail and leisure sectors have experienced considerable growth. Spending on retail goods has increased significantly over the past decade, particularly, and especially spending on comparison (or non-food) goods. This growth in spending is attributable to a number of factors, including greater disposable income, greater confidence in the economy, desire and new technology.
- 2.3 The retail market is changing continually as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes are having an impact on the format of retail and leisure floorspace. Research undertaken by British Council of Shopping Centres ('Future of Retail Property, 2006/7') identified that for the period 1999 to 2005 the proportion of new retail space developed in a UK town centre location rose from 22% of total floorspace developed, to 35%. This reflects the Government's 'town centres first' approach.

Trends in Comparison Goods Shopping

- 2.4 Whilst it is anticipated that over the next ten years the rate of growth in retail spending will slow, there will continue to be significant growth in retail expenditure, particularly in the comparison goods sector. Research undertaken by the BCSC identifies that there will be a need for more than six million square metres (gross) of additional comparison goods floorspace in England and Wales between 2006 and 2015, although this does not take into account developments under construction currently or commitments. Six million square metres is 10% of the 2005 stock.
- 2.5 The need for additional floorspace is based upon increasing population, increases in the proportion of disposable income spent on retail goods and the demand for new, larger format floorspace from retailers. Population growth and increases in the proportion of disposable income spent on retail goods are more attributed to affluent urban areas rather than rural

areas. The demand for new floorspace reflects this, which is principally within high-order urban centres and not rural areas with the characteristics of North Shropshire.

- 2.6 There is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples. All have been affected by significant increases in e-tailing. As a consequence of recent performance, retailers are more reluctant to commit to new retail developments, which is in contrast with previous decades. Instead, retailers are being more selective in choosing schemes that are certain to be successful in terms of location and the types of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve greater economies of scale of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods which are attractive to a broader catchment both socio-economically and geographically.
- 2.7 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods, Music Zone and Virgin Megastore.
- 2.8 There will continue to be demand for larger, more modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will be rejected increasingly. Conversely, many national retailers are now looking at smaller/ lower order centres in order to increase their market share. Many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

- 2.9 In the aftermath the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the publication in 2005 of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
 - Developing a wider range of outlets, for example small-format convenience stores at petrol filling stations and in town, district and local centres (e.g. Tesco Express), smaller

supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra);

- Extended opening hours;
- Offering cheaper products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.10 Verdict (2007) notes that supermarkets increased their combined floorspace by some 294,400 sq m in 2006, which is more than double the amount added in 2005. Tesco was prolific particularly by targeting aggressively, space as a means to boost sales. The closure in 2006 of a planning loophole regarding mezzanine floors led to a rush of floorspace expansions in supermarkets prior to this time. Tesco is expected to increase its UK floorspace by around 6% in 2007/08, with ASDA, Sainsbury's, Morrison's, Waitrose, Marks and Spencer's (Simply Food) and Iceland all set to open new stores. Growth at the discount end of the market is limited. 2007 saw Kwik Save in administration and only a minority of its portfolio reopen as rebranded 'Fresh Express' stores.

2.11 In terms of products, major areas of growth in the convenience sector are fresh fruit and vegetables, fair trade and organic produce, with customers willing to pay higher prices for food with the expectation of better quality produce and more ethical practices in production and supply.

2.12 The number of forecourt convenience stores, despite investment from the leading supermarket brands, is declining due to a reducing number of petrol filling station, static fuel sales and high operating costs. There are currently some 10,400 forecourt convenience stores in the UK this forecast to fall to around 8,500 by 2010 (UK Forecourt Retailing, IGD, 2005). The average floorspace of forecourt stores is increasing as all the major retailers continue to open and expand such operations to supplement their existing store networks.

2.13 Farmers' markets and specialist firms offering home delivery services, for example organic food delivery, are small-scale operations but are growing in popularity. It is in niche market areas, such as farmers' markets where rural areas such as North Shropshire have an opportunity to maximise return on the increasing proportion of disposable income that households spend on retail goods.

Growth in E-tailing ('E-commerce')

2.14 Many consumers who shopped previously in town centres and at retail parks are now using the internet for some of their purchases. There is evidence to suggest that E-tailing is as common, if not more common, in rural areas such as North Shropshire as it is in urban areas.

A recent report from Ofcom (the communications regulator) regarding broadband usage (May 2008) identified that broadband connection to the Internet is now more common in rural areas than in urban areas.

- 2.15 The overall trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be established fully. The rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks. Research undertaken by BCSC indicates that online sales will account for almost 11% of total retail spend by 2015. It is predicted that in some sectors this market share will be much higher. In the digital media sector, the market share achieved by online sales could increase to up to 50%.
- 2.16 The success of internet shopping is having an impact upon traditional high streets. It is likely that online retailing will put pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping. As the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Growth of online shopping could reduce turnover of small shopping centres (sized between 5,000 sq m and 20,000 sq m) notwithstanding growth in disposable income.
- 2.17 There is some evidence to suggest that the increase in e-commerce is impacting retailers' desire to expand their 'bricks and mortar' offer (BCSC, 2006). However, retailers are optimistic generally and envisage a continued demand for physical stores and, in the main; store development programmes will continue. Significantly, more retailers ranked physical stores first in order of importance, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as 'another' channel of distribution (BCSC, 2006).
- 2.18 As a consequence of the likely increase in e-tailing, retailers will adapt stores increasingly to create more 'experience-led' environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.
- 2.19 Despite all these different assumptions with regard to the future effect of online shopping, it is considered that e-tailing will not replace the physical shopping experience materially as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006).

Trends in Leisure

2.20 Leisure is the most rapidly expanding commercial sector of the UK economy and has experienced dramatic changes and growth during the last decade. Trends in the main commercial leisure sectors are explored below.

Cinemas

2.21 During the mid-1990s the established multiplex cinema operators undertook a rapid expansion programme. The operators moved away from their traditional City Centre locations and opened large 'category killer' cinemas (usually between 12-16 screens). This expansion marked the advent of the out of town leisure park as other leisure operators sought to locate adjacent to the cinemas, believing there was a natural synergy between the uses. This in turn fuelled the expansion in bingo and health & fitness and revived the interest in ten-pin bowling.

2.22 The cinema operators had expanded traditionally on a piecemeal basis, usually by acquiring their own freehold sites. In order to realise the proposed rapid expansion the operators had to sign up to institutional leases with high rents. Operators quickly realised that these rental levels were unsustainable and that the industry was reaching saturation level and could not sustain any further large developments. This was coupled with the downturn in cinema attendances, primarily as a result of limited 'blockbuster' movies and technological advances in home entertainment systems.

2.23 A downturn in the cinema market led operators to slow their acquisition programmes, although two companies were borne out of this, (Cine UK and Spean Bridge), who identified that there was a need for multiplex cinemas in medium-sized town (50,000 to 150,000 residents)¹, without existing cinema provision; a reduced attendance capacity was planned for commensurate with the size of the settlement. Many developers were left with sites with leisure permissions and no operator of interest: any development needs an anchor cinema to attract associated uses. Cine UK undertook a relatively unchallenged expansion throughout the United Kingdom, cherry picking the opportunities that were available and driving extremely hard financial transactions. This had a substantial impact on the developers' residual valuation and in many cases prevented sites earmarked for leisure development progressing.

2.24 More latterly, acquisition of cinemas has been at a corporate level with the main operators pursuing company acquisitions. The two most active operators in the United Kingdom currently are Vue and Cineworld.

Health and Fitness

- 2.25 At the same time as cinema expansion, the concept of the modern large private members health and fitness club was realised and there then followed rapid expansion by David Lloyd Esporta, Fitness First and Total Fitness as examples. This particular market has reached saturation point with operators now opening a limited number of new health clubs and expansion tending to occur through company acquisition. As the concept evolved, and in common with developments in the cinema industry, certain operators recognised the need for representation in towns not previously served (generally medium-sized towns with 50,000 to 150,000 residents)¹ and the likes of Fitness First and LA Fitness progressed acquisition programmes based on smaller units.
- 2.26 More recently, Total Fitness, whose philosophy is to construct large health clubs with lower membership fees and JJB Sports, who have pioneered their concept of a ground floor health & fitness club with mezzanine level retail situated primarily on retail parks, began to compete more aggressively.
- 2.27 With regard to swimming pool provision, it is generally only the larger health and fitness clubs in higher order centres that will provide such facilities. There is a critical catchment population and attendance required to support commercial swimming pools and small and medium (up to 50,000 residents)¹ to medium sized (50,000 to 150,000 residents)¹ centres are not generally of a size which is sufficient to justify such investment.

Bowling

- 2.28 Bowling centres have long been a traditional place of family entertainment. The concept has never been updated successfully although various operators have tried to expand the concept to a family entertainment centre; a combination of several complementary leisure uses under one roof. This concept has failed largely but has led to something of a revival in ten-pin bowling.
- 2.29 Hollywood Bowl is one of the only bowling centre operators seeking to develop new facilities. A number of successful existing operations are earmarked for expansion.
- 2.30 As with the cinema market, the fit out costs of bowling centres are extremely high and operators tend to negotiate transactions whereby they receive substantial amounts of up front cash from the developer. The other criteria for bowling centre operators are synergy with adjacent users, in particular cinemas. Operators prefer sites with complementary uses located nearby and large amounts of free car parking.

¹ WYG definition (2008) based upon retail and leisure characteristics of towns relative to resident population

2.31 Research group Mintel notes that the popularity of bowling has declined in recent years, and it is anticipated that this trend will continue. Bowling has undergone a shift in patronage, with attendees now more likely to be part of group visiting the location for mixed leisure activities rather than solely for ten-pin bowling. Although any growth in demand for bowling is likely to be restricted, demand for the expansion and refurbishment of existing venues may increase. Bowling centres have opened historically in medium sized towns and larger higher-order centres. There is a critical catchment population required to support such facilities and operators will consider expansion of existing facilities ahead of new development in small or medium sized towns.

Bingo

2.32 Bingo has been well represented in towns over many years. Initially operators located themselves in town centres but now have a preference for freestanding edge-of-town locations with free customer car parking. Bingo operators are the least concerned of the leisure operators about clustering with other leisure operators. The concept trades successfully on its own. Although bingo participation, particularly amongst the younger generations, has increased in recent years the UK smoking ban is likely to affect future expansion in this sector, at least in the short term. The smoking ban on enclosed public spaces and workplaces (July 2007) in place in Scotland earlier, has affected trading performance considerably.

Restaurants

2.33 This sector expanded mirroring the cinema expansion and was effectively split into two offers, namely out-of-town situated on leisure parks and the more traditional town centre premises.

2.34 The leisure park offer ultimately either performed poorly or reached a saturation level and now there are a few restaurant operators, such as Pizza Hut, Frankie & Bennys and Nandos, who are acquiring actively units in these locations.

2.35 The town centre restaurant offer has in many ways mirrored the trend of the edge-of-town/out-of-town operators with many having reached saturation level in town and city centres. There has also been a noticeable lack of 'new entrants' into the sector and therefore over and above the established national names such as Pizza Hut, McDonald's, and Chiquito are independents taking premises in town and city centres.

Public Houses

2.36 The location in which public houses are found can be split broadly into four sectors: edge-of-town locations on leisure parks; edge-of-town standalone sites on busy arterial roads; town and city centres; and village and rural locations.

- 2.37 Many operators jumped onto the success of the edge-of-town leisure development. However, it became apparent that this concept would not work for the public house operators. As a consequence the expansion on such schemes is extremely limited.
- 2.38 The operators remain keen on the potential to acquire sites on a freehold basis in good suburban areas and on prominent main roads and often will combine the offer with a budget hotel. Operations such as Whitbread and Punch Taverns are strong in both sectors.
- 2.39 In the town centre market, again due to corporate acquisition of companies, there is a limited occurrence of new entrants.
- 2.40 In rural areas, the number of public houses is in decline as these businesses are often the least profitable in a company's portfolio. This trend is exacerbated by the reducing number of independent breweries and the acquisition of portfolios by larger brewery groups, national organisations and multi-national companies. Where rural pubs are retained there is a trend towards diversifying both the offer, with most establishments serving food in addition to drink, and the use of the premises and the site. Opportunities to offer accommodation are exploited where possible and portfolio owners are becoming involved increasingly in development, in some instances increasing the value of land through the redevelopment of public houses or the sale of land assets for redevelopment and in other cases through redevelopment of parts of site, such as car park areas, to increase the financial return on sites.

3 METHODOLOGY

Survey Data

3.1 Empirical data form the basis of the Study and new surveys were commissioned.

Telephone Survey

3.2 A telephone survey of 500 households in the North Shropshire Area was undertaken by NEMS Market Research in December 2007. WYG has discussed extensively with NEMS, and other market research companies, including MORI, the appropriate quantum of interviews to undertake in a household survey. The industry-standard is that a minimum of 100 interviews per sub-area is required. This minimum requirement is achieved in this Study. The justification behind the minimum requirement is that there is a need for at least 100 interviews in each sub-area to ensure that there is no bias in the findings, which could occur, were a lesser number of interviews undertaken.

3.3 NEMS undertook the telephone survey in four survey zones. The Study Area and survey zones are shown on the plan at **Appendix 1** and in Figure 3.1. NEMS conducted 125 household surveys conducted in each of the survey zones: (Market Drayton, Whitchurch, Wem and Ellesmere). The post-code sectors within the survey zones are:

1. Market Drayton – TF9/1, TF9/2, TF9/3, TF9/4
2. Whitchurch – SY13/1, SY13/2, SY13/3, SY13/4
3. Wem – SY4/3, SY4/4, SY4/5
4. Ellesmere – SY11/3, SY12/0, SY12/9, SY4/2

3.4 The Study Area extends beyond the North Shropshire District boundary to match the sphere of influence of the principal towns. The Study Area extends into parts of the Oswestry authority area, Crewe and Nantwich, Shrewsbury and Atcham, Telford and Wrekin, Stafford, Newcastle-under-Lyme, and Chester local authority areas.

3.8 The Retail Study is informed by a pedestrian flow survey undertaken by NEMS. NEMS recorded the pedestrian flow at a number of count points in each of the four centres, to inform the vitality and viability assessments. The tabulated results of the pedestrian counts are included at **Appendix 4**. The count points used in each of the four centres were:

Ellesmere

- 1) Cross Street, Thoroughfare from car park
- 2) Town Square
- 3) Market Hall

Market Drayton

- 1) Corner of Maer Lane and Cheshire Street
- 2) Shropshire Street/ Cheshire Street
- 3) The Buttercross

Wem

- 1) Wem Town Hall
- 2) Aston Street (opposite New Street)
- 3) Rear of T.O. Williams

Whitchurch

- 1) Post Office on Green End
- 2) Bullring/ Watergate Street
- 3) Civic Centre

Town Centre Business Surveys

3.9 WYG conducted a survey of all commercial businesses within the Local-Plan defined Town Centre Shopping Area of the four centres. The business surveys were undertaken in addition to the shoppers' survey so that the views of the broadest cross-section of society are obtained; responses obtained from businesses are often quite different to the responses obtained from shoppers using those businesses. The response rates were: Ellesmere - 39%; Market Drayton - 37%; Wem - 33%; and Whitchurch - 26%. A summary of findings is included at **Appendix 5**.

Assessing the 'Vitality and Viability' of the Town Centre

3.10 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the well being of town centres. These indicators are:

- **Diversity of main town centre uses (by number, type and amount of floorspace):** An Experian Goad land use plan is used to assess the diversity of uses in each of the four centres (**Appendix 6**);
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** WYG includes all large-scale retail and leisure floorspace³ in the North Shropshire area in the assessment;
- **The potential capacity for growth or change of centres in the network:** WYG has considered the opportunity for the town centres to expand, including as a response to increases in population and year-on-year increases in disposable income and considering the scope for more intensive development on previously developed land;
- **Commercial Operator representation and intentions to change representation:** derived from the Goad data, town centre business surveys (Appendix 5) and in FOCUS⁴ reports for outstanding retailer demand where available (**Appendix 7**);
- **Shopping rents:** the average Zone A rents paid in centres, derived from published Valuation Office Agency (VOA) data, where available;
- **Proportion of vacant street level property:** derived from Goad data and on-site observations;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from VOA data;
- **Pedestrian flows:** from pedestrian counts;
- **Accessibility:** from in-street survey responses and from WYG site visits;
- **Customer and residents' views and behaviour:** from in-street surveys and the household survey;
- **Perception of safety and occurrence of crime:** from in-street surveys and business survey responses; and
- **State of the City/town centre environmental quality:** from in-street surveys, business survey responses and WYG site visits.

3.11 The completed vitality and viability assessments are included at **Appendix 8** of the Study.

Calculating Quantitative 'Capacity'

Retail - Convenience and Comparison Goods

3.12 The Study is undertaken using a goods-based methodology, i.e. the sale of goods by type (convenience and comparison) as advocated by PPS6.

'local planning authorities should assess the likely future demand for additional retail...floorspace, having regard to a realistic assessment of...forecast expenditure

³ purpose-built free-standing retail/leisure facilities

⁴ Established in 1990, FOCUS publishes comprehensive accounts of trends in UK shopping. Its FoRD report (FOCUS on Retail Demand) is the established benchmark of demand-side analysis in the retail market, covering over 1,100 retail centres. FOCUS collates requirements from over 900 retailers.

for specific classes of goods to be sold, within the broad categories of convenience and comparison goods'. [Paragraph 2.34]

- 3.13 Household survey data is used to calculate the market shares (the proportion of expenditure directed to a centre/retail destination within any given Study Area) for the town centres and freestanding destinations in the North Shropshire area. Market shares are projected forward to 2013, 2018; 2023; and 2026 in order to assess the future short, medium, long and ultra-long term 'expenditure capacity'. The statistical tables are contained at **Appendix 9**. The population within each postal code zone is derived from MapInfo AnySite data (2005 midyear estimate)². The population is projected forward using ONS 2004-based population projections for the Study Area (population projections for the North Shropshire area).

Expenditure from Outside of the Study Area

- 3.14 The survey area adopted in the Retail Study is drawn so as to include the great majority of shoppers who use the principal centres in the Study Area for convenience and comparison shopping. A limited proportion of turnover, generated from tourism-spend and from those passing through the Study Area, will be drawn from outside of it. It is likely that the great majority of this inflow of expenditure is incidental to travel; such inflow is common to most destinations. In-flow of expenditure deriving from passing trade and tourists in rural areas of the character of North Shropshire is usually no greater than 5% of spending, and is generally off-set by a similar outflow of expenditure deriving from residents of a Study Area spending money whilst travelling or on vacation. On these bases, no allowance is made in the statistical assessment.

Capacity Projections

- 3.15 Capacity figures are given for 2013 as this is five years from the base date of the Study and for 2018 and 2023, giving medium and long term considerations of capacity. Ultra-long term capacity is projected forward to 2026, in order to be consistent with the LDP time-frame. A five year time span is advocated at paragraph 3.10 of PPS6 as being appropriate for considering the 'need' for additional retail floorspace in respect of development proposals:

'The need for additional floorspace should be assessed no more than five years ahead, as sites in centre may become available within that period. Assessing the need beyond this time period might pre-empt future options for investment in centres, except where large town centre schemes are proposed and where a longer time period might be appropriate to allow for site assembly' [Paragraph 3.10]

- 3.16 The 2013 capacity figure is a useful guide as to whether the Council needs to allocate sites immediately for new retail development as part of the process of preparing its Development Plan Documents. Decisions over planning applications should be in accordance with the Development Plan Documents, unless material considerations indicate otherwise.

² MapInfo Anysite is an industry recognized GIS-based source for demographic data including consumer spending patterns

Accordingly, it is important that the Development Plan Documents have a clear strategy for retail and leisure development over the period which they cover.

- 3.17 The Study is an important material consideration in Development Control decisions. In accordance with national planning guidance on the location of new retail development, the quantitative 'capacity' identified should be accommodated within town centres prior to other sites being considered. For sites outside town centres to be acceptable, it will be necessary to demonstrate that there are no alternative sites within town centres to meet any identified need, where centres are in the catchment area of a proposed development.
- 3.18 The advice is that medium, long and ultra-long term capacity identified in this Study (over the periods to 2018, 2023 and 2026) should be viewed with some caution and it is not intended that it be satisfied on out-of-centre sites (unless there is good reason to do so) because this may prejudice future town centre opportunities that are yet to become available, but may become available beyond 2013.

Market Share Calculations

- 3.19 Market share is calculated by applying the survey results, by sub-zone, to local expenditure estimates derived from MapInfo AnySite². For convenience retail goods, expenditure is broken down into:
- 'main-convenience' (shoppers' usual destinations for bulky convenience shopping); and
 - 'top-up convenience' (shoppers' usual destinations for top-up shopping, undertaken in-between bulk convenience shopping trips).
- 3.20 For comparison retail goods, the exercise is undertaken on the basis of 'non-bulky' goods (Clothes and Shoes; Small Household; CDs, DVDs and Books; Recreation; and Chemist Goods) and 'bulky' goods (Furniture and Carpets, Electrical and DIY). For the purposes of the statistical analysis, the market shares are combined into overall 'convenience' and 'comparison' capacities, in line with Government guidance in PPS6.

Growth Rates

- 3.21 In estimating future 'capacity', the spending power of the catchment population is projected forward on the basis of forecast growth rates as contained in MapInfo Information Brief 07/02 (September 2007)⁵. The growth rates in the MapInfo Information Brief are national averages, but it should be borne in mind that these are applied to actual demographic data (on convenience and comparison retail spending patterns) for each of the zones within the

² MapInfo Anysite is an industry recognized GIS-based source for demographic data including consumer spending patterns

catchment area. Although the growth rates are derived nationally, they are projected forward from a start point which records the most recent actual conditions locally. Expenditure available is projected forward using actual growth rates for the period 2005 to 2006 and projections thereafter.

- 3.22 In terms of convenience goods, MapInfo identifies an actual growth rate of +1.0% between 2005 and 2006 (Table 1 of MapInfo Information Brief 07/02), and a forecast growth rate of 1.2% per annum between 2005 and 2017 (Table 2 of MapInfo Information Brief 07/02). For the purposes of this study this forecast growth rate has been utilised up to 2026. For comparison goods, MapInfo identifies an actual growth rate of 5.5% between 2005 and 2006, and a forecast growth rate of 5.3% per annum between 2005 and 2017.
- 3.23 Scope is incorporated in the calculations to allow existing town centre floorspace to improve its trading performance through floorspace efficiencies. This is assumed to be 0.5% per annum for convenience retail floorspace and 1.5% per annum for comparison retail floorspace. This is a means of safeguarding and enhancing town centre vitality and viability in line with Development Plan strategies.

Internet Shopping

- 3.24 The Household Survey records the extent to which residents of the Study Area, for convenience and comparison shopping, use the Internet. The capacity assessment adopts a constant market share approach throughout (i.e. the market share of each destination is applied to the total expenditure available at 2013, 2018, 2023 and 2026). Internet shopping is addressed in the same manner. It is assumed that Internet shopping purchases will continue at the same rate; overall spending on convenience and comparison goods using the Internet will increase, but the market share will remain constant. WYG accepts that the market share of internet shopping, particularly in the comparison goods sector, is likely to increase. This study does not model an increase in market share of the internet as to do would be singling out one of many likely future changes. The Council should be aware that an increase in the market share of the internet could reduce physical capacity for new floorspace.

Sequential Approach

- 3.25 PPS6 (Paragraph 2.41) sets out that the need for new retail floorspace should be met in locations in appropriate existing centres. On this basis, the assessed 'need' for additional retail floorspace in the towns includes growth in spending pro rata to the market share of any edge-of-centre and out-of-centre retail facilities, with that growth allocated to the nearest town centre. This need should be met in the first instance by new retail floorspace in the town

⁵ MapInfo Information Brief 07/02 published September 2007 is a recognized source of patterns in consumer retail expenditure growth

centre and not by new edge of centre or out of centre retail floorspace. Under the terms of national planning guidance, all new retail development should be directed to town centres in the first instance. PPS6 indicates that this principle is applicable equally to bulky goods.

'...it will not be sufficient for an applicant to claim merely that the class of goods proposed to be sold cannot be sold from the town centre'. [Paragraph 3.16]

- 3.26 The four town centres in North Shropshire should be the principal location for new retail and leisure development. Growth in spending throughout the Study Area should be satisfied by new retail and leisure facilities in the four towns. It is recognised that in rural areas, freestanding stores are an important feature of the local community, reducing the need for residents to travel large distances by car to buy essential comparison and convenience goods. Such facilities are particularly important for the elderly and those with limited mobility and limited access to private transport. Consequently it should be a secondary aim of the Council to support stores in other rural areas, outside of defined centres, in the interests of social inclusion.
- 3.27 It is an optimum aim for town centres to attract the majority of expenditure growth, which is apportioned to them when applying current market share. Stores in rural areas are important to rural communities. The Council should seek to direct a proportion of capacity derived through expenditure growth towards rural areas. It is important to support rural communities, village stores and local service facilities such as Post Offices. This could come about through significant qualitative improvements in the current retail offer, which should be an aspiration of the Council. Farm shops are present in North Shropshire as a result of farm diversification. These facilities also play a key role in supporting rural communities and should be sustained and enhanced with Council support where possible.

Leisure

- 3.28 As outlined in Section 2, in urban areas it is common for retail and leisure studies to undertake a commercial leisure assessment in the same (quantitative) manner as retailing. The Leisure assessment is normally undertaken in four key commercial leisure sectors: Bingo; Cinema; Health and Fitness; and Ten-Pin Bowling. However, in rural areas there is little value in undertaking such commercial assessments where the majority of, or in some cases all, leisure visits for such activities are made to destinations outside of the authority area and rural areas do not have the critical mass of population necessary for operators to be attracted away for developing in high-order centres.
- 3.29 Due to the rural nature of the North Shropshire area, instead of assessing quantitative need in discreet leisure sectors, WYG will consider the qualitative offer in the Study Area. An indication is provided of the thresholds required to support Bingo, Cinema, Health and Fitness and Ten-Pin Bowling facilities.

Qualitative Retail Need

- 3.30 In addition to any quantitative retail need, there may also be a qualitative need for new retail or provision. This is informed by the household survey, which will identify the extent to which, in the convenience retail sector, retail facilities are overtrading and where shopping expenditure is leaking from the Study Area to destinations outside of it. The in-street survey too, seeks to identify any qualitative deficiencies in existing provision as perceived by visitors to the town centre. The analysis of need for additional retail floorspace takes into account any qualitative deficiency in existing provision, in advising appropriate strategies for future development.

4 SHOPPING IN NORTH SHROPSHIRE

The Telephone Survey

- 4.1 The Study Area is shown on the plans at Appendix 1.
- 4.2 The analyses of the telephone survey exclude the 'don't know/ varies/ no pattern' and 'don't regularly buy' responses.
- 4.3 Normal convenience shopping patterns will comprise of more than one destination and the assessment is divided into main-food convenience and top-up shopping. The proportion of expenditure spent by residents on main food and top-up shopping is calculated individually on a zone by zone basis, using the data recorded in the household survey. This revealed that residents in the Study Area spend between 84% and 87% on their main food shopping trips, with the remaining expenditure directed towards top-up shopping. This is a higher main food/ top-up split than that normally recorded in retail studies and is reflective of a rural area where food shopping is more likely to be undertaken less frequently and in bulk during one weekly, fortnightly or monthly trip.
- 4.4 In respect of comparison shopping, a proportion of money spent is apportioned to eight categories of comparison goods: Electrical; Furniture; and DIY; (which together comprise bulky goods); and clothing and footwear; household goods; CDs, DVDs and books; recreational goods; and chemist goods, (which together comprise non-bulky goods). The Glossary to this report provides a definition for each comparison goods category adopted.
- 4.5 The proportion of expenditure directed towards each category is derived from MapInfo AnySite² data for each sub-Region of the Study Area. However, it should be noted that PPS6 does not distinguish between comparison goods types. PPS6 stipulates that when assessing quantitative need for additional development, expenditure levels should relate to the class of goods to be sold within the broad categories of 'convenience' and 'comparison' goods. However, both 'bulky' and 'non-bulky' goods within the comparison goods sector have been analysed for the purposes of this Study in order to provide a qualitative assessment.
- 4.6 The analyses below are based upon interviewees' main destinations for convenience shopping ('main-convenience' and 'top-up' shopping) and for comparison shopping ('non-bulky goods', 'bulky goods' and 'DIY goods'). The statistical analysis (Appendix 9) assesses market share in main convenience, top-up convenience and the comparison sectors and then combines the convenience and comparison datasets to provide a capacity assessment for the broad convenience and comparison retail goods categories as is advised by PPS6.

² MapInfo AnySite is a industry recognized GIS-based source for demographic data including consumer spending patterns

4.7 The market shares given below are based on the proportion of expenditure attracted by each destination, as opposed to the proportion of shopping trips. In addition it should be noted that within different comparison goods sectors there will be internal dynamics which affect provision within a town centre. For example, although a centre may appear to be well represented in the 'clothing and footwear' goods sector, within this sector there may be a lack of certain types of trader for example children's clothes shops.

Comparison Shopping

Non Bulky Goods - Clothing and Footwear Goods

Destinations within North Shropshire account for a limited proportion of expenditure by residents for clothing and footwear goods. Overall the North Shropshire Area has a market share of just 12%, with only Market Drayton (6%) and Whitchurch (6%) attracting any expenditure whatsoever. Outside of the North Shropshire Area, the most frequently frequented destinations for clothing and footwear goods is Shrewsbury Town Centre (39%), followed by the internet/ home delivery spending (8%), Chester Town Centre (7%), Wrexham Town Centre (7%) and Telford Town Centre (6%).

Within Zone 1 ('Market Drayton') Market Drayton attains a market share of 19% of clothing and footwear expenditure, and is the only destination within North Shropshire to attract any expenditure within this zone. However, Shrewsbury Town Centre (27%) accounts for the greatest proportion of expenditure in this zone. Other popular destinations outside of the North Shropshire Area include Stoke-on-Trent City Centre (11%), Telford Town Centre (11%) and the internet/ home delivery (11%).

In Zone 2 ('Whitchurch') 21% of expenditure by residents is retained in the North Shropshire Area, with the remaining 79% being leaked to other destinations. Whitchurch is the most popular destination in the North Shropshire Area achieving a market share of 20% of expenditure, although Market Drayton attracts 1% of expenditure. Again Shrewsbury Town Centre is the most popular destination overall, with a market share of 30%, although Chester Town Centre (15%) also attracts a notable proportion of expenditure.

Shrewsbury Town Centre attracts the majority of expenditure in Zone 3 ('Wem'), accounting for nearly 76% of expenditure on clothing and footwear goods by residents. This reflects the close proximity of Shrewsbury to this zone. Whitchurch accounts for 2% of expenditure in Zone 3, and is the only destination in North Shropshire to record any clothing and footwear expenditure.

Finally, in Zone 4 ('Ellesmere') just 1% of expenditure is accounted for by destinations in North Shropshire, with 99% of expenditure on clothing and footwear goods being leaked. The most popular destinations in this zone are Shrewsbury Town Centre (27%), Wrexham Town Centre (25%), Oswestry Town centre (16%) and Chester Town Centre (14%).

Evidently the North Shropshire Area is not an important destination for clothing and footwear, with residents preferring to spend their money at other destinations outside of the North Shropshire Area for such products. Market Drayton and Whitchurch are the only centres to record any expenditure, although these are seen to be important to residents that live within close proximity to them. The other centres in the North Shropshire Area provide a more limited role in the clothing and footwear sector. However, a rural area such as North Shropshire would not be expected to contain a wide array of clothing and footwear shops, with such retailers tending to be located in high-order retail centres within larger catchment populations.

Non Bulky Goods - Small Household Goods

Within the Study Area, North Shropshire attracts 34% of expenditure on small household goods. This is split between Market Drayton (18%), Whitchurch (13%), Wem (3%) and Ellesmere (1%). 60% of expenditure is directed towards destinations outside of the North Shropshire Area principally Shrewsbury Town Centre (31%), with the residual 6% being spent online or via home delivery services.

In Zone 1 ('Market Drayton'), Market Drayton attracts the majority of expenditure available with a market share of 54%. In this Zone, Shrewsbury is also a popular destination (19%), together with Telford Town Centre (7%).

Whitchurch attracts 46% of expenditure in Zone 2 ('Whitchurch'), with destinations in North Shropshire as a whole attracting 48% of small household goods expenditure by residents of this zone. Outside the North Shropshire Area Shrewsbury is again the most popular destination (22%).

Retention of expenditure by destinations in North Shropshire by residents in Zones 3 and Zone 4 is significantly lower than that recorded in Zones 1 and 2. Indeed, for small household goods 14% of expenditure by residents in Zone 3 ('Wem') and 6% of expenditure by residents in Zone 4 ('Ellesmere') is directed to facilities in North Shropshire.

In Zone 3 ('Wem'), Wem Town centre is the most significant destination in the North Shropshire Area is a 10% market share, although Shrewsbury Town Centre is dominant overall, attracting 64% of small household goods expenditure in this zone.

With regard to Zone 4 ('Ellesmere'), the majority of expenditure is split between Oswestry Town Centre (31%), Wrexham Town Centre (22%), and Shrewsbury Town Centre (17%), although spending via the internet/ home delivery is also important (9%).

In conclusion, overall retention of approximately a third of expenditure by residents of the Study Area on small household goods is retained by destinations in the North Shropshire Area. The majority of this expenditure is drawn from Zone 1 and Zone 2, with Market Drayton and Whitchurch being the most important destinations in North Shropshire

Non Bulky Goods – CDs, DVDs and Books

The statistical analysis of the household survey indicates that facilities in North Shropshire attract a little under 27% of expenditure by residents of the Study Area on CDs, DVDs and Books. 53% of expenditure on these types of goods is spent outside of the North Shropshire Area and a significant 20% of expenditure is undertaken over the internet/ home delivery.

Overall the destination with the greatest market share for this type of good is Shrewsbury Town Centre (27%), followed by Market Drayton (13%) and Whitchurch (12%).

Retention rates for CDs, DVDs and Books expenditure by destinations in North Shropshire is highest in Zone 2 ('Whitchurch') – 47% and Zone 1 ('Market Drayton') – 39%. In Zone 2 Whitchurch attracts the greatest proportion of expenditure on CDs, DVDs and Books out of any destinations, achieving a market share (39%). Internet shopping is popular in these zones, with a market share of 29% in Zone 1 and 20% in Zone 2.

In Zone 3 ('Wem') facilities in the North Shropshire Area account for just under 10% of total expenditure by residents, with most of this directed towards Wem (7%). Shrewsbury Town Centre is the most popular destination overall in this Zone, with a 63% market share.

With regard to Zone 4 ('Ellesmere') just 1% of expenditure is retained by destinations in North Shropshire. The most popular destinations for this type of spending are Shrewsbury Town Centre (26%), Oswestry Town Centre (22%) and Wrexham Town Centre (21%).

Facilities in North Shropshire retain a little over a quarter of all expenditure generated for CDs, DVDs and Books by residents of the Study Area. Market Drayton Town Centre and Whitchurch Town Centre are the strongest performers in the North Shropshire Area, although Wem Town Centre and to a lesser extent Ellesmere Town Centre also account for at least some expenditure.

Non Bulky Goods – Recreational Goods

Destinations within North Shropshire attract some 20% of expenditure on recreational goods by residents of the Study Area, with Market Drayton (9%) and Whitchurch (8%) accounting for the greatest proportion of expenditure. The remaining expenditure is split between a number of different destinations outside of the North Shropshire Area, although Shrewsbury Town Centre is the most popular (32%). The internet/ home delivery accounts for 13% of expenditure on this type of goods.

In Zone 1 ('Market Drayton') the largest market share of expenditure is achieved by Market Drayton (30%) although this is the only destination in North Shropshire to attain any expenditure from this zone. Leakage is predominately via the internet/ home delivery (16%), to Shrewsbury Town Centre (15%), Stoke-on-Trent City Centre (13%) and Telford Town Centre (9%).

North Shropshire retains 31% of expenditure on recreational goods by residents of Zone 2 ('Whitchurch'), mainly due to the attraction of Whitchurch Town Centre (30%). This is the greatest retention by the North Shropshire Area in any of the four survey zones. Outside of the North Shropshire Area, the destinations which attract the largest proportion of expenditure are Shrewsbury Town Centre (19%), the internet/ home delivery (16%) and Chester Town Centre (11%).

Retention is lowest in Zone 3 ('Wem') and Zone 4 ('Ellesmere'), which achieved respective market shares of 7% and 4%. In Zone 3 Shrewsbury Town Centre is dominant, whilst in Zone 4 expenditure is mainly split between Shrewsbury Town Centre (34%) and Oswestry Town Centre (20%).

Retention of recreational goods expenditure in the Study Area is low, reflecting a general lack of provision in this sector. Retention is highest in Zone 2, followed by Zone 1, although even in these zones remains modest. Expenditure via the internet/ home delivery is highest in Zone 1 and Zone 2, possibly due to the more remote nature of these catchments.

Non Bulky Goods – Chemist Goods

Destinations in North Shropshire account for the majority of expenditure by residents on chemist goods, with the North Shropshire Area achieving a market share of 57% overall. . The greatest market shares are recorded by Market Drayton (25%) and Whitchurch Town Centre (20%). Outside of the North Shropshire Area, Shrewsbury Town centre has the greatest market share attracting 21% of expenditure by residents on chemist goods.

In Zone 1 ('Market Drayton'), Market Drayton accounts for a most expenditure by residents on this type of good (77%). In Zone 2 ('Whitchurch) Whitchurch Town Centre is dominant, achieving a market share of 76%. In Zone 3 ('Wem') Shrewsbury Town Centre attracts the greatest proportion of expenditure (59%), although Wem is also an important destination (28%). In Zone 4 ('Ellesmere') the majority of expenditure on chemist goods is split between Oswestry Town Centre (38%), Ellesmere Town Centre (22%), Shrewsbury Town Centre (19%) and Wrexham Town Centre (9%).

Retention of expenditure by residents of the Study Area within the North Shropshire Area is significantly greater for chemist goods than any other sub-category of non-bulky goods. This reflects the shorter distances residents are prepared to travel for such items, and their homogenous nature

Overall Non Bulky Shopping Patterns

4.8 Market Shares in the non bulky sector (taken from Appendix 9, Table 25a) in the Study Area are:

▪ Ellesmere	1.0%;
▪ Market Drayton	12.9%;
▪ Wem	2.4%;
▪ Whitchurch	10.6%;
▪ Chester City Council Area	4.7%;
▪ Crewe and Nantwich Borough	1.0%;
▪ Oswestry	4.7%;
▪ Shrewsbury and Atcham Borough	34.8%;
▪ <i>Shrewsbury Town Centre</i>	31.6%;
▪ <i>Other Shrewsbury</i>	3.2%;
▪ Stoke-on-Trent City Council Area	3.1%;
▪ Telford and Wrekin Borough	4.6%;
▪ Wrexham County	5.5%;
▪ Other	6.0%; and
▪ Internet/ home delivery	8.8%.

4.9 The summary at Paragraph 4.8 illustrates that in the non-bulky goods comparison retail sector, Market Drayton (12.9%) and Whitchurch (10.6%) attract a significant, but limited, market share of expenditure in the Study Area. Wem (2.4%) and Ellesmere (1.0%) attract a much lesser proportion of expenditure in the Study Area. Overall, **the four principal centres within the North Shropshire Area retain 26.9% of non-bulky comparison goods spending generated in the Study Area.** In a rural area, where the principal centres are lower-order centres in the sub-regional retail hierarchy, there will always be a significant leakage of comparison goods expenditure to higher order centres. The leakage rate of 73.1% is high, as retention of rate of 50% is achievable realistically in a rural area with the character of North Shropshire. However, the level of leakage is not usually high; indeed, in comparison to other Shropshire towns recent studies identified leakage of 88% within Bridgnorth District (Bridgnorth town centre – 11%) and 88% leakage in South Shropshire District (Ludlow town centre - 11%)⁶. Although it is important to note that these comparisons should be treated with a 'note of caution' given the extent of study areas adopted in identifying leakage within the different studies. **The principal leakage of expenditure is to Shrewsbury town centre, which attracts over 30% of all non-bulky comparison goods spending generated in the North Shropshire area.**

⁶ Derived from Bridgnorth District Council Retail Study (August 2006) and South Shropshire District Retail and Leisure Study 2006 to 2021 (July 2007)

Bulky Goods / DIY Goods

Electrical Goods

In the electrical goods sector 31% of expenditure is directed towards destinations in North Shropshire. These include Whitchurch (15%), Market Drayton (8%), Wem (6%) and Ellesmere (2%). 56% of expenditure is directed towards destinations that lie outside of the North Shropshire Area, with 13% of spending being conducted online or via home delivery services. Leakage is predominately to Shrewsbury Town Centre (22%).

With regard to Zone 1 ('Market Drayton'), 29% of electrical goods expenditure is retained within the North Shropshire Area by facilities in Market Drayton (26%) and Whitchurch (3%). Leakage in this zone includes destinations such as Stoke-on-Trent City Centre (13%), Shrewsbury Town Centre (13%) and Crewe Town Centre (7%).

Zone 2 ('Whitchurch') records the greatest proportion of expenditure directed towards facilities in the North Shropshire Area out of the four survey zones. Indeed in this zone the majority of expenditure on electrical goods (55%) is attained by destinations in the North Shropshire, particularly Whitchurch which has a market share of 51%.

In Zone 3 ('Wem') some 21% of expenditure on electrical goods generated by residents is directed towards North Shropshire, with Wem Town Centre being the most prolific destination in the North Shropshire Area (19%). Shrewsbury Town Centre attracts the greatest proportion of expenditure in this zone overall, with a market share of 49%, although Meole Brace Retail Park is also an important destination attracting 12% of expenditure.

In Zone 4 ('Ellesmere') the North Shropshire Area retains a modest 16% of expenditure, most of which is directed towards Ellesmere Town Centre (11%). The majority of expenditure that is leaked is directed towards a variety of destinations outside of the North Shropshire Area including Oswestry Town Centre (22%), Shrewsbury Town Centre (20%) and Wrexham Town Centre (18%).

Overall retention of electrical goods expenditure by destinations in the North Shropshire area is modest, and there appears to be scope to improve the offer of the North Shropshire Area in this regard.

Furniture and Carpets

Retail facilities in North Shropshire attract approximately a third (33%) of expenditure on furniture goods generated by residents of the Study Area. This expenditure is split between Market Drayton Town Centre (15%), Whitchurch Town Centre (10%), Wem Town Centre (5%) and Ellesmere Town Centre (2%). Of the 63% of expenditure that is accounted for by destinations outside of the North Shropshire Area, most is directed towards destinations in Shrewsbury and Atcham (38%), and in particular Shrewsbury Town Centre (31%). The residual 4% of expenditure is accounted for by internet/ home delivery services.

In Zone 1 ('Market Drayton'), Market Drayton Town Centre accounts for the greatest proportion of furniture goods expenditure (46%). Leakage in this zone is principally to Shrewsbury Town Centre (24%) and Stoke-on-Trent City Centre (9%).

In terms of Zone 2 ('Whitchurch') facilities in North Shropshire attract some 44% of expenditure on furniture and carpet goods by residents, with Whitchurch Town Centre being the most important destination (33% market share). Leakage in this zone is predominately to Shrewsbury Town Centre (21%) and Chester Town Centre (8%).

Facilities in North Shropshire account for 21% of expenditure in Zone 3 ('Wem'), with Wem Town centre being the most popular destination in the North Shropshire Area in this zone (15%). However, the most popular destination overall in Zone 3 is Shrewsbury Town centre, which accounts for over half (54%) of the expenditure generated.

13% of expenditure generated in Zone 4 ('Ellesmere') is retained by destinations in North Shropshire. Leakage is predominately to Oswestry Town Centre (27%) and Shrewsbury Town Centre (27%).

The modest recorded retention levels of furniture goods by destinations in the North Shropshire Area reflect a need to strengthen provision in North Shropshire. Market Drayton and Whitchurch are the only centres which attract a meaningful proportion of furniture goods expenditure.

DIY Goods

In terms of DIY goods expenditure, facilities in the North Shropshire Area attract a majority of expenditure on this type of good with a market share of 51%. Key destinations in the North Shropshire Area include Homebase, Axis Centre, Market Drayton (17%), Whitchurch Town Centre (12%), Market Drayton Town Centre (8%) and Homebase, Waymills Road, Whitchurch (8%). 46% of expenditure by residents of the Study Area is directed towards destinations outside of the North Shropshire Area, predominately to facilities in Shrewsbury and Atcham Borough, and 2% is spent online or via home delivery services.

In Zone 1 ('Market Drayton') the facilities in the North Shropshire Area attract approximately 80% of expenditure by residents on DIY items. This is directed towards facilities in Market Drayton in the main, particularly the Homebase, Axis Centre (51%) and Market Drayton Town Centre (25%).

With regard to Zone 2 ('Whitchurch') 78% of expenditure on DIY goods is directed to destinations in North Shropshire. This is due to the strong performance of Whitchurch Town Centre (44%) and Homebase, Waymills Road, Whitchurch (29%).

Retention of expenditure by destinations in Zone 3 ('Wem') and Zone 4 ('Ellesmere') of the Study Area is significantly lower than that recorded in Zone 1 and Zone 2. Facilities in North Shropshire account for 16% of expenditure in Zone 3 and 14% of expenditure in Zone 4. In Zone 3 key destinations outside of the North Shropshire Area are B&Q, Brixton Way, Shrewsbury (31%) and Shrewsbury Town Centre (28%). In Zone 4, expenditure on DIY goods is a number of destinations including Oswestry Town Centre (26%), Ellesmere Town Centre (3%), B&Q, Brixton Way, Shrewsbury (13%), Shrewsbury Town Centre (13%) and B&Q, Berse Road, Wrexham (13%).

Retention of DIY goods expenditure by destinations in North Shropshire is higher than any other category of bulky goods, and reflects the range of facilities available in the North Shropshire Area.

Overall Bulky Shopping Patterns

4.10 Market Shares in the bulky sector (taken from Appendix 9, Table 24a) in the Study Area are:

▪ Ellesmere	2.1%;
▪ Market Drayton	15.5%;
▪ <i>Market Drayton Town Centre</i>	<i>10.6%;</i>
▪ <i>Homebase, Axis Centre</i>	<i>4.6%;</i>
▪ <i>Buildbase, Adderley Road</i>	<i>0.2%;</i>
▪ Wem	4.8%;
▪ Whitchurch	14.7%;
▪ <i>Whitchurch Town Centre</i>	<i>12.3%;</i>
▪ <i>Homebase, Waymills Road</i>	<i>2.2%;</i>
▪ <i>Other, Whitchurch</i>	<i>0.2%;</i>
▪ Chester City Council Area	1.8%;
▪ Crewe and Nantwich Borough	2.2%;
▪ Oswestry	4.8%;
▪ Shrewsbury and Atcham Borough	31.6%;
▪ <i>Shrewsbury Town Centre</i>	<i>22.1%;</i>
▪ <i>Other Shrewsbury</i>	<i>9.5%;</i>
▪ Stoke-on-Trent City Council Area	3.6%;
▪ Telford and Wrekin Borough	2.9%;
▪ Wrexham County	5.0%;
▪ Other	3.7%; and
▪ Internet/ home delivery	7.2%.

4.11 The summary of bulky goods shopping patterns in the Study Area (Paragraph 4.10) illustrates that in the bulky goods comparison retail sector, Market Drayton (15.5%) attracts the greatest market share of expenditure of the four principal towns in North Shropshire. Market Drayton town centre accounts for the majority of this (10.6%) with a lesser 4.9% directed to destinations outside of the centre of which the majority is directed to Homebase at the Axis Centre (4.6%). The next most popular destination in the North Shropshire area for DIY goods shopping is Whitchurch, and Whitchurch town centre attracts a greater market share (12.3%) than Market Drayton town centre. The overall market share of Market Drayton (14.7%) includes 2.4% of all bulky goods expenditure directed to destinations outside of the centre, the majority of which is directed to the Homebase at Waymills Road. Wem and Ellesmere attract a much lesser proportion of spending from the Study Area, with a market share of 4.8% and 2.1% respectively.

4.12 **Overall, the four principal centres within the North Shropshire area retain 37.1% of bulky goods comparison spending generated in the Study Area.** The current nature of bulky goods retailing is of domination by a limited number of retailers many of whom trade principally from out of centre retail parks. Retailing in the North Shropshire area is concentrated principally in-centre, with little out of centre retailing. This is an appropriate model for a rural area and in many respects a sustainable pattern of retail provision. There is a limited offer in the bulky goods sector, albeit there are two large-format DIY stores outside

of Market Drayton and Whitchurch centres, which forces shoppers to seek destinations outside of the North Shropshire area. The leakage rate of 62.9% is high and, in common with non-bulky goods retailing, it is reasonable to expect the North Shropshire area to retain up to 50% of bulky goods expenditure generated within the Study Area.

4.13 **The principal leakage of bulky goods comparison retail expenditure is to Shrewsbury (31.6%), of which the town centre attracts 22.1% of all spending generated in the North Shropshire Area.**

The Role of Comparison Stores in the North Shropshire Area

4.14 The Household Survey records the following overall comparison goods market shares (taken from Appendix 9, Table 23a):

▪ Ellesmere	1.3%;
▪ Market Drayton	13.6%;
▪ Wem	3.1%;
▪ Whitchurch	11.8%;
▪ Other, North Shropshire	0.1%;
▪ Chester City Council Area	3.9%;
▪ Crewe and Nantwich Borough	1.3%;
▪ Oswestry	4.7%;
▪ Shrewsbury and Atcham Borough	33.9%;
▪ <i>Shrewsbury Town Centre</i>	<i>28.9%;</i>
▪ <i>Other Shrewsbury</i>	<i>5.0%;</i>
▪ Stoke-on-Trent City Council Area	3.3%;
▪ Telford and Wrekin Borough	4.1%;
▪ Wrexham County	5.4%;
▪ Other	5.3%; and
▪ Internet/ home delivery	8.3%.

4.15 **Overall, the survey findings for comparison goods retail indicate that destinations in North Shropshire attract less than a third (30%) of expenditure generated in the Study Area that is spend on comparison goods.** This reflects the limited provision in North Shropshire, although due to the rural nature of the Study Area and the size of the principal shopping centres it would not be expected to offer a broad range of comparison goods stores. The principal comparison goods destination in the Study Area is Market Drayton, which attracts 14% of comparison goods expenditure, followed by Whitchurch which attracts 12%. This compares to a retention level of only 13% in South Shropshire District (as identified in the South Shropshire District Retail and Leisure Study 2006 to 2021 – July 2007). However, as previously highlighted direct comparisons with other retail studies should be treated with caution. **In a rural area of the character of North Shropshire, it is reasonable to expect 50% of comparison goods retail expenditure to be retained.**

Market Drayton and Whitchurch are the appropriate centres in which the Council should seek to encourage uplift in comparison retail turnover and comparison retail market share.

- 4.16 In the clothing and footwear sector, approximately 92% of available expenditure is directed towards destinations outside of North Shropshire. In terms of small household goods, over 66% of expenditure is leaked to other destinations; over 73% of expenditure on CDs, DVDs and Books is spent outside North Shropshire; and 80% of recreational goods expenditure is accounted for by facilities outside of the North Shropshire Area. Less than half (43%) of all chemist goods expenditure generated in the Study Area is directed to destinations outside of it.
- 4.17 With regard to the bulky goods, although the North Shropshire area accounts for over half (51%) of expenditure in the DIY sector, the retention of expenditure on both furniture goods and electrical goods is low. In terms of furniture goods, 69% of expenditure is directed to destinations outside the area. 77% of electrical goods expenditure is directed to destinations outside of the area.
- 4.18 Internet/ home delivery goods spending is an important component of comparison goods shopping amongst residents of North Shropshire, particularly given its rural location. The proportion of expenditure accounted for by this sector varies from 2% for chemist goods and DIY goods, to 20% for CDs, DVDs and books. Overall internet/ home delivery spending accounts for 8% of comparison goods spending by residents of North Shropshire.
- 4.19 It is evident from the statistical analysis that most comparison spending by residents of the Study Area occurs outside of it. This is particularly acute in Zone 3 ('Wem') and Zone 4 ('Ellesmere'). Zone 3 includes areas in Shrewsbury and Atcham Borough, and these straddle the Shrewsbury conurbation itself. Zone 4 extends into Oswestry and Shrewsbury and Atcham, although it is almost entirely within North Shropshire. Outside of the Study Area, the destination which attracts the greatest proportion of expenditure is Shrewsbury Town Centre (29%). Other important destinations include Oswestry Town Centre (5%), Wrexham Town Centre (5%), Chester Town Centre (4%) and Telford Town Centre (4%).
- 4.20 Penetration maps showing the draw and market shares based on proportion of expenditure attracted to facilities in each of the four principal towns in the North Shropshire Area in the convenience and comparison sectors and the bulky goods and non-bulky goods sub-categories are included at **Appendix 10** of this report. These plans illustrate that the darker the shading the higher the market share that particular centre achieves from the survey zone. For example, Figure 10.2 at Appendix 10 indicates that for convenience goods shopping facilities in Market Drayton draw the highest level of expenditure from Zone 1, with

proportionally less trade from the other zones in the catchment, including no trade from Zone 4.

Convenience Shopping

Main Convenience Shopping

With regard to main food shopping expenditure generated in the Study Area, facilities in the North Shropshire Area attract the majority of expenditure (55%). 43% of expenditure is directed towards destinations outside of North Shropshire, with 2% being spent via the internet/ home delivery.

In terms of individual stores, the statistical analysis at Appendix 9 indicates that the stores which draw the highest proportion of expenditure are: Morrison's, Maer Lane, Market Drayton (21%), Tesco, White Lion Meadow, Whitchurch (20%); and Tesco Extra, Cattle Market, Shrewsbury (13%). Together these three stores account for over 53% of all main food shopping expenditure generated in the Study Area.

Within Zone 1 ('Market Drayton'), facilities in Market Drayton attract 81% of main food shopping expenditure, with the Morrison's store at Maer Lane achieving a market share of 64%.

In Zone 2 ('Whitchurch') nearly 82% of main food shopping expenditure is retained by destinations in North Shropshire, with most of this directed towards facilities in Whitchurch, which have a market share of 78%, predominately due to the strong performance of the Tesco store at White Lion Meadow (71%).

With regard to Zone 3 ('Wem') retention of main food expenditure by destinations in the North Shropshire Area is much lower with a quarter of expenditure retained. This expenditure is directed to the Co-op at the Morris Central Shopping Park (20%) in the main. Most expenditure in this zone is directed towards facilities in Shrewsbury and Atcham Borough (73%) and in particular Tesco extra, Cattle Market, Shrewsbury (39%) and Morrison', Whitchurch Road, Shrewsbury (23%).

Finally with Zone 4 ('Ellesmere') just 15% of expenditure is retained by destinations in the North Shropshire Area. In terms of leakage, the most popular destinations are Sainsbury's, Black Gate Street, Oswestry (13%), Morrison's, Whitchurch Street, Shrewsbury (12%) and Stan's Superstore, St Martins (10%).

Consequently whilst retention of main food shopping trips is high in Zone 1 and Zone 2, in Zone 3 and Zone 4 facilities located within the North Shropshire Area play a lesser role in the provision of main food goods to residents of North Shropshire, within facilities in Shrewsbury being more dominant.

4.21 The pattern of main convenience shopping in the Study Area recorded by the Household Survey is:

▪ Ellesmere	1.5%;
▪ Market Drayton	25.9%;
▪ Morrison's, Maer Lane	20.7%;
▪ Other, Market Drayton	5.2%;
▪ Wem	5.6%;
▪ Co-op Food Store, Morris Central Shopping Park	5.4%;
▪ Other, Market Drayton	0.2%;
▪ Whitchurch	22.4%;
▪ Tesco, White Lion Meadow	19.6%
▪ Other, Whitchurch	2.8%;

▪ Crewe and Nantwich Borough	1.3%;
▪ Newcastle-under-Lyme Borough	1.9%;
▪ Oswestry	6.9%;
▪ Shrewsbury and Atcham Borough	24.9%;
▪ <i>Tesco Extra, Cattle Market, Shrewsbury</i>	12.8%;
▪ <i>Morrison's, Whitchurch Street, Shrewsbury</i>	8.8%;
▪ <i>Other Shrewsbury</i>	3.3%;
▪ Telford and Wrekin Borough	1.7%;
▪ Wrexham County	4.8%;
▪ Other	1.4%; and
▪ Internet/ home delivery/ mail order	1.8%.

Top-up Shopping

Top-up shopping refers to shopping for convenience goods that is undertaken in between main food purchases, for everyday essential food items such as bread and milk. As people are not prepared to travel large distances for these types of items, the proportion of top-up food expenditure that is retained within North Shropshire is significantly higher than that recorded for main food goods shopping. Indeed in excess of 75% of top-up shopping expenditure generated by residents of the Study Area is directed towards destinations in the North Shropshire Area, within a little under 25% being spent at destinations outside of the North Shropshire Area.

In Zone 1 ('Market Drayton') over 91% of top-up food expenditure is directed towards facilities in Market Drayton, in the greater proportion of expenditure recorded by Morrison's, Maer Lane (32%), Iceland, Cheshire Street (24%) and the Co-op Late Shop, Eccleshall Road (13%).

Zone 2 ('Whitchurch') is still dominated by the Tesco, White Lion Meadow, Whitchurch (51%) although a range of other local shopping destinations are also recorded. Overall facilities in Whitchurch retained close to 81% of top-up expenditure by residents in this zone, with North Shropshire overall retaining 90% of top-up food expenditure.

The majority (59%) of top-up food expenditure by residents in Zone 3 ('Wem') is directed towards destinations in North Shropshire, in particular Wem which has a market share of 36%. In this zone, the market share of the Co-op Foodstore, Morris Central Shopping Park is significant (36%). Outside of the North Shropshire Area, leakage is mainly to facilities in Shrewsbury and Atcham Borough (36%).

A little under half (48%) of total top-up food expenditure by residents in Zone 4 ('Ellesmere') is accounted for by facilities in North Shropshire, with destinations in Ellesmere Town Centre performing well (42%). Leakage in this zone is to facilities in Oswestry (32%) and Shrewsbury and Atcham Borough (12%) in the main.

Whilst large-format foodstores still account for the greatest proportion of top-up expenditure, for example the Tesco, White Lion Meadow, Whitchurch (12%) and the Morrison's, Maer Lane, market Drayton (11%), there is greater dispersion with top-up food shopping expenditure compared to main food shopping expenditure, with a greater array of local, independent and small stores recorded.

4.22 Top-up shopping patterns in Study Area as a whole are:

▪ Ellesmere	9.0%;
▪ <i>Co-op, Cross Street</i>	3.3%;
▪ <i>Local Shops, Ellesmere Town Centre</i>	5.7%;
▪ Market Drayton	30.2%;

▪ <i>Morrison's, Maer Lane</i>	10.5%
▪ <i>Iceland, Cheshire Street</i>	7.6%;
▪ <i>Other, Market Drayton</i>	12.1%;
▪ Wem	13.3%;
▪ <i>Co-op Food Store, Morris Central Shopping Park</i>	9.6%;
▪ <i>Other, Market Drayton</i>	3.7%;
▪ Whitchurch	19.0%;
▪ <i>Tesco, White Lion Meadow</i>	12.1%
▪ <i>Other, Whitchurch</i>	6.9%;
▪ Other, North Shropshire	3.8%;
▪ Crewe and Nantwich Borough	1.5%;
▪ Newcastle-under-Lyme Borough	1.3%;
▪ Oswestry	6.3%;
▪ Shrewsbury and Atcham Borough	11.7%;
▪ Telford and Wrekin Borough	1.0%;
▪ Wrexham County	1.3%;
▪ Other	1.6%; and
▪ Internet/ home delivery/ mail order	0.0%.

4.23 The overall pattern of convenience shopping in the Study Area, combining main and top up shopping is:

▪ Ellesmere	2.7%;
▪ Market Drayton	26.5%;
▪ <i>Morrison's, Maer Lane</i>	19.1%;
▪ <i>Iceland, Cheshire Street</i>	2.7%;
▪ <i>Other, Market Drayton</i>	4.7%;
▪ Wem	6.8%;
▪ <i>Co-op Food Store, Morris Central Shopping Park</i>	6.1%;
▪ <i>Other, Market Drayton</i>	0.7%;
▪ Whitchurch	21.8%;
▪ <i>Tesco, White Lion Meadow</i>	18.5%;
▪ <i>Iceland, Brownlow Street</i>	2.1%;
▪ <i>Other, Whitchurch</i>	1.2%;
▪ Other, North Shropshire	0.6%;
▪ Chester City Council Area	1.3%;
▪ Crewe and Nantwich Borough	1.8%;
▪ Oswestry	6.8%;
▪ Shrewsbury and Atcham Borough	22.8%;
▪ <i>Tesco Extra, Cattle Market, Shrewsbury</i>	11.3%;
▪ <i>Morrison's, Whitchurch Street, Shrewsbury</i>	7.6%;
▪ <i>Other Shrewsbury</i>	3.9%;
▪ Telford and Wrekin Borough	1.6%;
▪ Wrexham County	4.3%;
▪ Other	1.5%; and
▪ Internet/ home delivery/ mail order	1.5%.

- 4.24 Penetration maps showing the trade draw of the four town centres in the convenience sector within the Study Area are contained at Appendix 10.

The Performance of Convenience stores in the Study Area

- 4.25 When assessing the convenience retail performance of stores and defined towns it is important to understand whether or not existing facilities are overtrading or undertrading. If a town or store is overtrading, it means that actual turnover (based on the results of empirical research), is greater than the expected performance of the town or store based on UK average sales densities. In such circumstances the floorspace is attracting more expenditure than would be expected were it to trade at average levels. In other words it is trading above the level that would be expected. The implication of this is that there is a need for additional convenience floorspace to redirect some of the expenditure currently attracted to the overtrading town or store. If more convenience floorspace is not provided, then the shopping experience of shoppers using the overtrading town or store will be reduced, and the market share of the town will start to decline. When a town is undertrading the opposite is true: the town/store is attracting less expenditure than would be expected, and consequently there is an oversupply of convenience floorspace meaning that there is a reduced capacity for new floorspace.
- 4.26 It is apparent from examination of the turnover of centres against their expected turnover (Table 5 at Appendix 9) that all centres and indeed all stores within the North Shropshire Area are undertrading in the convenience retail sector. This is considered unusual as similar retail studies for Bridgnorth and South Shropshire identified existing convenience goods provision to generally be overtrading. Although the statistical tables do not consider expenditure inflow from outside the Study Area (including tourism spend) it is not likely that the turnover of convenience facilities is under-represented greatly. The Study Area has a small population and limited retail expenditure potential. Furthermore the floorspace densities used at Appendix 9 are a national average; a store trading in a major urban area would be expected to have a significantly higher floorspace sales density than a store in a rural area such as North Shropshire.
- 4.27 **Market Drayton is the centre that attracts the greatest proportion of convenience spending retained in the North Shropshire Area (£13.5m)**. Its market share accounts for 45% of all convenience expenditure that is retained by destinations in North Shropshire. The most successful store in the town is the Morrison's at Maer Lane; this facility records a turnover of some £9.8m which compares to an expected turnover based on average sales densities of £16.4m. As such, the store is undertrading by approximately £6.6m (or 40%). With regard to the expenditure recorded for the other convenience stores in Market Drayton,

these are seen to be undertrading by £5.0m (or 55%), with an expected turnover of £9.0m compared to a survey recorded turnover of 4.0m.

- 4.28 **Whitchurch attracts the second largest proportion of convenience goods expenditure retained in the North Shropshire Area, with stores having a combined turnover of £11.1m.** This is predominantly directed to Tesco at White Lion Meadow. This has a survey derived turnover of £9.4m which compares to an expected turnover of approximately £12.4m, and is thus undertrading by £3.0m (or 24%). Other facilities in Whitchurch have a combined turnover of £1.7m based on the statistical analysis, which compares to an expected turnover based on average sales densities of £7.0m; these facilities are undertrading by £5.3m (or 76%).
- 4.29 Facilities in Wem account for nearly £3.5m of convenience goods turnover generated by residents of the Study Area. This compares to an expected turnover of £5.0m and so facilities are undertrading by £1.6m (or 32%). The Co-op foodstore at Morris Central Shopping Pak is the largest retail destination in the town, which is undertrading by £1.2m. Facilities in Ellesmere have a combined turnover of £1.4m according to the statistical analysis which compares to an expected turnover based on company benchmark of £2.9m. Convenience facilities in Ellesmere are undertrading by approximately £1.5m (or 52%).
- 4.30 **The two largest convenience retail stores, Morrison's, Market Drayton and Tesco, Whitchurch account for 38% of all convenience goods expenditure generated in the Study Area.** Other stores in the North Shropshire Area play a lesser role in meeting convenience goods retail needs and are used predominately as more localised, top-up shopping goods. **Overall, facilities within the North Shropshire Area retain 58.4% of convenience goods spending generated within it. This is a reasonably healthy performance for a rural area. WYG does not consider that an area with the character of North Shropshire should expect to retain more than 70% of convenience retail expenditure.** Convenience retail spending patterns will always be shaped by travel to work patterns, and other linked trips with higher order centres.
- 4.31 Whilst retention of convenience goods expenditure is high in Zone 1 ('Market Drayton') and Zone 2 ('Whitchurch'), within which facilities in the North Shropshire Area record market shares of 83% each, destinations outside of North Shropshire account for the majority of convenience expenditure in Zone 3 ('Wem') and Zone 4 ('Ellesmere'). In Zone 3, facilities in Shrewsbury and Atcham Borough account for the most expenditure generated (67%), which is understandable given the close proximity of Shrewsbury Town Centre to the Study Area. In Zone 4, 79% of convenience expenditure is directed to facilities outside of the North Shropshire Area, principally in Oswestry (36%) and Shrewsbury and Atcham (22%). This is

comparison expenditure (£14.4m). Overall, facilities in Market Drayton account for nearly 18% of expenditure generated in the Study Area.

- 4.34 Whitchurch is the second largest retail destination in the North Shropshire Area with regard to turnover. It has a combined comparison and convenience turnover of £23.6m, which is 15% of expenditure generated across the whole Study Area and 39% of the expenditure directed to the four town centres in North Shropshire. The turnover is split between convenience goods spending (47%) and comparison goods spending (53%).
- 4.35 The turnovers of both Wem (£6.7m) and Ellesmere (£2.8m) is significantly lower than that for either Market Drayton or Whitchurch, and collectively they account for a market share across the Study Area of 6%. The turnovers of Wem and Ellesmere comprise similar proportions of convenience and comparison goods expenditure.
- 4.36 Most of the expenditure generated in the Study Area for both convenience and comparison goods is directed towards destinations outside of the North Shropshire Area. This leakage is mainly to facilities in Shrewsbury and Atcham (30%), Oswestry (5%) and Wrexham (5%). Internet/ home delivery spending accounts for a notable 6% of spending, the majority of which is attributable to the purchase of comparison goods.

5 OTHER KEY TOWN CENTRE USES - OFFICE AND LEISURE PROVISION IN NORTH SHROPSHIRE

Overview

Leisure

- 5.01 The rural nature of the Study Area means that leisure facilities are geared towards servicing very localised and specific needs. There are few commercial leisure facilities within the Study Area; residents of the Study Area are required to travel outside of the Study Area to access facilities, ten-pin bowling and bingo. Appendix 11 provides a full schedule of leisure facilities within Ellesmere, Market Drayton, Wem and Whitchurch and their surrounding areas.
- 5.02 As explained above, the limited provision of commercial leisure facilities means that it is not feasible to complete a quantitative assessment of leisure capacity. It is more appropriate to consider the local leisure services provided by each of the centres and identify key qualitative deficiencies that need to be addressed.

Office

- 5.03 The Council commissioned in 2006 BE Group to complete an Employment Land Study of the Study Area. This Study does not seek to replicate the findings of the Study, but is minded of the key findings arrived at. The Study found that the Study Area has an insular property market, where demand for industrial space outweighs significantly demand for office space. Market Drayton and Whitchurch are the larger centres and have the greatest office space provision and demand, driven by both their size and proximity to the West Midlands conurbation and the motorway network at least when considered relatively with Ellesmere and Wem.
- 5.04 The Employment Land Study found that requirements for offices are for units of less than 100 sq. m generally. There is limited inward investment, given the rural location of the Study Area and poor communications, and the market attracts local stakeholders in the main. There is a need to encourage the small office market, which will be encouraged by development of an Enterprise Centre in Market Drayton. WYG agrees with the advice of BE Group that the rural economy is critical to the Study Area and the Council should promote, support and encourage the conversion of buildings in rural areas to commercial uses. However, the four town centres will continue to be the focus of office activity and this will be concentrated principally in Market Drayton and Whitchurch.

Ellesmere

Leisure

- 5.05 There is a swimming centre in Ellesmere, which is part of Ellesmere County Primary School on Elson Road and 1.3km from the centre of Ellesmere. Ellesmere library is located at Victoria Street. There are not any other public leisure facilities in Ellesmere. There are a number of bars and restaurants in Ellesmere: the Railway Inn on Cross Street; the Market Hotel on Scotland Street; and The Cellar Restaurant on High Street; and The White Hart Inn and Asian Spices, both on Birch Road. Others bars and restaurants in the area surrounding Ellesmere are listed at Appendix 11.
- 5.06 The town has a number of tourist attractions. The Mere at Ellesmere is the largest mere in Shropshire. Principal leisure activities at The Mere are walking, fishing and activities related to an interest in wildlife. There is a children's play area at Cremorne Gardens and a series of signpost guided walks around the Mere. Regional cycle route 31 passes through Ellesmere.
- 5.07 Other local tourist attractions are Colemere within Colemere Country Park, which is 5km to the south-east of Ellesmere. Colemere is designated as a Local Nature Reserve, Site of Special Scientific Interest and RAMSAR site. Leisure activities comprise walking, sailing (there is a sailing club) and wildlife appreciation.
- 5.08 There is a marina and moorings on the Llangollen canal at Ellesmere.
- 5.09 Ellesmere is not large enough to support commercial leisure facilities that are common to higher order centres. It is important that the town retains its existing leisure facility as part of the Ellesmere County Primary School and the Council should encourage the development of a health and fitness centre sufficient to meet local needs. The tourist attractions located near to the town are important generators of income. Opportunities should be explored to maximise the spin-off benefits that these tourist attractions can bring to the town centre. There is an opportunity for shops, restaurants, cafés and services to tap into the tourist market. Visitors to tourist attractions should be encouraged wherever appropriate to use town centre facilities additionally.
- 5.10 The redevelopment of Ellesmere Wharf (Pochin Developments) is residential-led, but also includes live-work units, a care home, retirement apartments and extra-care sheltered housing. A foodstore, public house, café, restaurant, medical centre, pharmacy, crèche and car parking will be provided. The mixed-use scheme will also provide a new public square and nature areas.

Office

- 5.11 There is a very limited office market in Ellesmere, occupied in the main by Class A2 service uses rather than Class B1 offices. Any office development in the Study Area is likely to succeed in the larger centres of Market Drayton and Whitchurch rather than the smaller centres of Ellesmere and Wem. Ellesmere business park is located on the A495 with links to the A5 and M54. Shropshire County Council marketed the site successfully and all plots are now taken, which are of between 0.25ha and 1.0ha and suitable for office, industrial or warehouse development.
- 5.12 The objective in Ellesmere is to ensure that sufficient office space is provided to meet the needs of service providers, who have businesses that are open to the public, and the local office market. The Council should ensure that maximum use is made of upper floors within the town centre as unused or under-used upper floors provide the greatest opportunity to meet local office needs. Elsewhere in the Study Area, there may be opportunities for public funding to kick-start development of office space but WYG does not consider that Ellesmere has the strength of market necessary to attract businesses other than those that locate in Ellesmere on the basis of proximity to local market served.

Market Drayton

Leisure

- 5.13 Market Drayton and Whitchurch are the largest centres in the Study Area and the provision of leisure facilities reflects this. Market Drayton Library on Cheshire Street is one of seven in community libraries in the North Shropshire Area. There is a health and fitness club on Cheshire Street (Bodytech), a sports centre (Maurice Chandler) at Warrant Road, Stoke Heath and a swimming centre at Phoenix Bank. The Greenfields Recreation Area on Greenfields Lane provides extensive outdoor facilities for football, rugby and tennis. There are a number of restaurants and public houses within the town centre and outside of the town. Appendix 11 provides a list of other restaurants, public houses and hotels.
- 5.14 The Dorothy Clive Garden at Willoughbridge (approximately eight miles from Market Drayton and outside the North Shropshire District) has a number of formal and wild gardens and a tea-room.
- 5.15 Market Drayton and Whitchurch are the principal centres in which commercial leisure development will prosper. However, neither is large enough to attract larger commercial leisure space users such as cinema, ten-pin bowling, large-format bingo or large format health and fitness suites.
- 5.16 It is important that Market Drayton retains its existing sports related provision, which is comprehensive currently comprising health and fitness club, sports centre and swimming

centre. It is important for towns of this size to ensure that local needs are met and that residents of the Study Area who seek health and fitness activity are not required to take put membership at facilities in higher order centres.

- 5.17 With regard to the night time economy, it is clear that there are a number of restaurants, bars and public houses meeting local needs. The location of these facilities is mixed between in centre and out of centre. It is important to foster the evening economy in the town centre and the Council should encourage the development of facilities that will generate activity within the principal shopping areas outside of trading hours.

Office

- 5.18 Although Market Drayton is one of the two larger centres in the Study Area, the office market, in common with the smaller centres of Ellesmere and Wem, is dominated principally by Class A2 businesses that are public facing and a limited number of Class B1 office premises. There are offices associated with the Muller/Cullina operations, which are on the outskirts of the town. Shropshire County Council is promoting development plots at Phase II of the Tern Valley Business Park, which would be suitable for office or industrial development.

- 5.19 It is important to ensure that Market Drayton maximises the potential for office development and continues to tap into any spin-off benefits of Muller/Cullina being located on the outskirts of the town. Whitchurch is also well placed, relative to the remainder of the Study Area, to tap into the trend, identified in the 2007 Employment Land Study, for out of town offices on greenfield sites with good accessibility to the regional and national communications networks. The Council should explore in tandem the possibilities for developing new small-format office space in the town centre and office space on a larger scale in free-standing locations. Obviously the bringing forward of sites in less central and, potentially, greenfield locations has ramifications for accordance with local and national planning policy but the Council should be seeking to drive office provision in Market Drayton as part of an overall authority-wide strategy for economic and commercial development.

Wem

Leisure

- 5.20 Wem Library and Learning Centre is located in Talbot House on High Street. The Wem Swimming Centre is located at Bowens Field. The Morgan Library is located on Aston Street and is home to the Museum of Myth and Fable. Other than these two facilities, there are not any leisure facilities in Wem. There are three restaurants in the town located at High Street, Leek Street and Soulton Road.

- 5.21 Given its size, there is little prospect of commercial leisure operators opting to open facilities in Wem. Any provision that is directed to the Study Area will be located in the higher-order centres of Market Drayton and Whitchurch. It is important for the Council to encourage the retention of existing facilities: the swimming centre and the library, and promote access to facilities in the other three towns by public transport.
- 5.22 There is a limited evening economy, serving local needs only. The Council should seek to encourage this element of the commercial offer in Wem. In common with the other centres within the Study Area, and in common with all small rural town centres, the Council should seek to promote niche leisure markets in which the centres can succeed.
- 5.23 Hawkstone Park and Follies is located at Weston-under-Redcastle, 6.4km to the east of Wem. The historic park and monuments date from the late eighteenth century and are used currently as a multi-facility leisure destination. The facility includes: a 68-bedroom hotel; two 18-hole golf courses; a six-hole academy course; a purpose-built golf centre; two restaurants; and conference, banqueting and wedding facilities. The follies comprise a series of cliffs, crags, caves and deep woods. English Heritage has awarded Hawkstone Park Follies with Grade I certification on its Register of Historic Gardens and Parks.

Office

- 5.24 In common with Ellesmere, there is a very limited commercial office market in Wem and the only office space taken is by businesses meeting local needs. It is important that the Council ensures that such office space requirements continue to be met, local needs are provided for and best use is made of available space such as upper floors above operational commercial businesses. Quasi office/industrial space is provided at the Wem Business Park, Engineering Park and industrial estate. Wem Business Park is the conversion of the former Wem brewery into a range of office, industrial and commercial units in a mix of refurbished buildings and new purpose built premises. Wem Business Park has increased the range of industrial and commercial floorspace available in the town, increasing its attractiveness as a business location and the overall vitality and viability of the town.

Whitchurch

Leisure

- 5.25 There are three health and fitness clubs in Whitchurch, one at the Brownlow Street parade and two at Waymills. Whitchurch swimming centre is located off White Lion Meadow, Bridgwater Street. The town is well provided for by restaurants, take-away establishments, bars and public houses.

5.26 In respect of recreational pursuits, Brown Moss nature reserve is located near to Edgeley, to the south of Whitchurch, which is a haven for plant life and wildlife. There is a rally driving school at the Sandford Industrial Park, Prees Heath, which is 9.5km to the south of Whitchurch.

5.27 Whitchurch has the greatest potential of all the centres in the Study Area to meet the commercial leisure demands of North Shropshire residents. It is important that the Council seeks to protect the existing leisure offer, supporting the commercial health and fitness clubs and the swimming centre at Bridgwater Street. Although Whitchurch is not a large enough centre with a large enough catchment area to attract commercial leisure facilities such as cinema, ten-pin bowling or large-format bingo the fact that it is the largest commercial centre in the Study Area is important in marketing the centre as suitable for smaller-scale commercial leisure operation. The Council should be pro-active in seeking to attract new leisure facilities to the town to complement those present already.

5.28 There is evidence of a night time economy already and clear potential to develop this. There is scope for the further development of this, and the Council should encourage a restaurant, café and bar culture in Whitchurch commensurate to its role as the principal centre in the Study Area.

Office

5.29 Of the four town centres in the Study Area, Whitchurch is the centre which appears to be developing a niche commercial office sector with the greatest success. The 2007 Employment Land Study identified two schemes in Whitchurch that are seeking to meet local needs for small-scale office accommodation in the Study Area. The Professional Business park in Whitchurch is focussed upon providing smaller offices (under 100 sq. m) to meet local needs. It also identifies the services office scheme at The Manse, which is one of two serviced office schemes in the Study Area; the other being Baker House in Shawbury.

5.30 Whitchurch Business Park, on the eastern edge of the town adjacent to the A525/A41 by-pass, including former school buildings of about 2,000 sq. m is under construction currently. The former school buildings offer potential for office space.

5.31 WYG considers that Whitchurch offers the greatest potential for attracting office space users to the Study Area. Much of the development and promotion to date has focussed upon out of centre business parks. The Council should ensure that the town centre benefits from development of office space and that a mixed-use centre is created with maximum use of upper floors and vacant space.

6 NORTH SHROPSHIRE RETAIL ASSESSMENT

Retail Need and Capacity

Overview

- 6.1 The statistical tables at Appendix 9 use the findings of the Household Survey to calculate the need and capacity for new retail floorspace in North Shropshire, in both the convenience and comparison sectors, over the periods to 2013, 2018, 2023 and 2026. The calculations at Appendix 9 give a short, medium, long and ultra-long term views of need and capacity.
- 6.2 The Council is working currently with other Shropshire Councils on a Local Development Framework for the Shropshire Unitary Authority Area. The retail need and capacity identified over the period to 2013 is of direct relevance to this. The medium term, long term and ultra-long term need and capacity are relevant in the context of the future reviews of the Local Development Framework, although it is advisable that the Council update this Study periodically and ideally at least every five years. In the context of development control, PPS6 advises that, in considering applications for retail development, local planning authorities should project need forward no more than five years, except where major town centre development proposals are involved. As set out in Section 2, paragraph 3.10 of PPS6 considers a five year timeframe as being appropriate for considering the 'need' for additional retail floorspace.
- 6.3 Indicative need and capacity assessments are provided for 2018, 2023 and 2026, but should be viewed with some caution. Any identified need or capacity beyond 2013 is not justification for new retail floorspace outside of existing centres, as this could prejudice from coming forward more central sites, that, although not available for retail development at present, may become available between now and 2013 or after 2013.
- 6.4 The quantitative need for new floorspace is derived from growth in spending power, as a result of year-on-year growth in per caput spending and population growth. The quantitative assessment is on a constant market share basis; i.e. assuming that retail destinations retain their current market shares in the convenience and comparison retail sectors. It is assumed that existing convenience retail floorspace within centres will increase its turnover by 0.5% per annum as a result of floorspace efficiencies whilst comparison retail floorspace is assumed to increase in efficiency by 1.5% per annum; a proportionate adjustment is made to the need figures to account for these floorspace efficiencies. In assessing the combined qualitative and quantitative need for additional convenience goods floorspace (the capacity), account is taken of the trading performance of existing stores so as to factor in any under or overtrading. Furthermore, other qualitative issues such as 'leakage' of expenditure and lack of consumer choice should be considered alongside quantitative capacity.

- 6.5 Growth in expenditure pro-rata to the current market shares of edge-of-centre and out of centre retail facilities is aggregated to the need and capacity identified by centre where appropriate. This is based upon the principle that all new retail floorspace should be accommodated within defined town centres in the first instance. Only after all potential town centre opportunities have been exhausted should less central sites be considered.
- 6.6 It is important to note that the capacity figures given for 2008 and the periods to 2013, 2018, 2023 and 2026 are cumulative not independent. For example if a store is developed in a defined centre over the period to 2013, the capacity at 2018 will be less than quoted in the tables, as the new floorspace created should be deduced from the 2018 capacity for retail floorspace. All retail floorspace given for the medium-term (to 2018), long-term (to 2023) and the ultra-long term (to 2026) are indicative only.
- 6.7 The implication of the identified need for a town centre not being met within that town centre is that the market share of that centre will decline. PPS6 identifies that both quantitative (which is linked primarily to growth in expenditure) and qualitative need (which includes overtrading of existing floorspace and lack of choice) should be assessed in identifying retail need. In this respect, in assessing 'need' for additional retail floorspace in North Shropshire it is appropriate to consider quantitative and qualitative need together. Indeed, the new draft PPS6 places equal weight on demonstrating quantitative and qualitative need

Market Drayton

Quantitative Retail Need – Market Drayton

- 6.8 Table 6.1 sets out the convenience and comparison retail need for Market Drayton Town Centre over the periods to 2013, 2018, 2023 and 2026. An allowance is made for existing convenience retail floorspace increasing its efficiency by 0.5% per annum. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made at this stage for the undertrading of existing floorspace.

TABLE 6.1: QUANTITATIVE NEED – MARKET DRAYTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE MARKET DRAYTON AREA)

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
TURNOVER 2008	13.5	-	14.4	-
CAPACITY				
AT 2008				
BY 2013	1.0	84- 229	3.8	705- 1,008
BY 2018	2.1	172- 470	9.2	1,585- 2,265
BY 2023	3.3	263- 721	16.5	2,640- 3,771
BY 2026	4.0	314- 860	22.0	3,366- 4,808

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
 Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m based on WYG judgement
 N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Convenience Goods

- 6.9 Without considering over or undertrading of existing provision, in the short term over the period to 2013, Table 6.1 indicates a need for an addition of between 84 sq m (net) and 229 sq m (net) of new convenience floorspace in Market Drayton, depending on the type of convenience retailer to be accommodated. This limited requirement could be met by bringing vacant outlets in the town centre back into use, given that the vitality and viability assessment indicated some 3,240 sq m (gross) of vacant retail floorspace.
- 6.10 In the medium term to 2018, there is a need for between 172 sq. m (net) and 470 sq. m (net) of additional convenience retail floorspace, dependent upon the sales density of floorspace that comes forward. This could again be accommodated within existing outlets and vacancies in Market Drayton.
- 6.11 In the long term (to 2023) and the ultra-long term (to 2026) there is sufficient need to support convenience floorspace of a retail outlet of up to 721 sq m (net) or 860 sq m (net) respectively. This level of floorspace could be met by either an extension of existing convenience floorspace or re-occupancy of existing vacancies.

Comparison Goods

- 6.12 Over the short-term to 2013 there is a need for between 705 sq m (net) and 1,008 sq m (net) of additional comparison retail floorspace required in the town centre. This is based on average sales densities of £5,000/ sq m and £3,500/ sq m, which depend on the type of comparison goods trade to occupy space. For example a warehouse type comparison goods retailer will have a significantly lower sales density than a retailer selling high value goods, such as mobile phone retailers. This level of capacity could be accommodated by either occupancy of vacancies or a small extension to existing comparison floorspace.
- 6.13 In the medium-term, the requirement for new comparison floorspace increases to between 1,585 sq m (net) and 2,265 sq m (net). However, this is indicative only and a more detailed

assessment of need should be carried out at most five years after the publication of this Study. For indicative purposes only, in the long-term up to 3,771 sq m (net) of new comparison floorspace may be required, whilst in the ultra-long term there is capacity for up to 4,808 sq m (net) of additional floorspace. This requirement could support a more meaningful expansion of comparison provision in the town centre.

Qualitative Convenience Retail Capacity – Market Drayton

- 6.14 Table 6.2 also includes qualitative convenience retail capacity for Market Drayton immediately and over the periods to 2013, 2018, 2023 and 2026.
- 6.15 As indicated in Section 5 above existing floorspace in the town centre, and in particular the Morrison’s, Maer Lane, is undertrading by some £6.6m and as a result there is no capacity for additional convenience retail goods floorspace over the period to 2026. However this is based on current market share and if a new store were brought into the town, the market share attained by facilities in Market Drayton would be expected to increase. They may also be a qualitative case to be made for increasing the range of convenience stores in the town centre in order to offer a greater degree of choice for residents.

TABLE 6.2: QUALITATIVE CAPACITY – MARKET DRAYTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE MARKET DRAYTON AREA)

YEAR	CONVENIENCE	
	£(m)	Sq. m (net)
TURNOVER 2008	13.5	-
CAPACITY		
AT 2008	-11.9	-
BY 2013	-10.9	-
BY 2018	-9.8	-
BY 2023	-8.6	-
BY 2026	-7.9	-

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
 N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Commitments and the Requirement to Identify Sites – Market Drayton

- 6.16 Construction on the site of the former Market Drayton medical centre at Frogmore Road is underway in early 2008. The predominantly residential scheme includes 1,258 sq. m gross/1,006 sq. m net⁷ of comparison retail floorspace. The floorspace under development will meet the need identified over the period to 2013. **There is a demonstrable need for additional comparison retail floorspace, over and above the new retail floorspace at Frogmore Road, beyond 2013.**
- 6.17 The Market Drayton Town Centre Plan (Appendix 6) and the Vitality and Viability Assessment for the town (Appendix 8) identify 24 units vacant in Market Drayton town centre with a gross

floorspace of 3,240 sq. m. Tables 6 and 7 of the Market Drayton Vitality and Viability Assessment identify that both the proportion of units vacant and the proportion of floorspace vacant is above the national average. If it is assumed that 80% of the gross floorspace is net sales area, then 2,592 sq. m is available to reopen as retail floorspace. **The quantum of floorspace vacant in addition to the commitment at Frogmore Road is sufficient to meet the need for new retail floorspace over the period to at least 2022 and beyond 2026 potentially, dependent upon the sales density of new retail floorspace.**

- 6.18 At any point in time there will be vacant floorspace in any retail centre, as a result of the opening and closing of businesses, refurbishment of floorspace and redevelopment of sites. In centres where the proportion of units and floorspace vacant is well below the national average, it is often reasonable to exclude vacant floorspace from a capacity assessment as vacancy is often temporary. In Market Drayton, the quantum of floorspace vacant and the time over which some of that floorspace has remained vacant means that it is appropriate to include it within an assessment of the capacity of the town to meet the need for additional retail floorspace identified. **The combined capacity of the new retail floorspace at Frogmore Road and existing floorspace vacant is sufficient to meet the identified need for the town. There is not any requirement for the Council to identify further sites for new retail floorspace for the town to retain its market share.**
- 6.19 Section 4 of this Study identifies that four principal towns in the Study Area retain only 30% of comparison goods retail expenditure in the Study area. WYG considers that a market share of 50% is reasonable in an area with the character of North Shropshire. To achieve uplift in market share from 30% to 50% would require considerable new floorspace, extending the offer of the towns appreciably and reversing a trend of North Shropshire residents shopping for comparison retail goods outside of the North Shropshire area. WYG considers that Market Drayton and Whitchurch are the appropriate towns in which to deliver additional floorspace, to improve the comparison retail offer and bring about uplift in the proportion of expenditure retained. **Although there is not a need to identify additional sites in Market Drayton if the town is to retain its market share, there may be a qualitative argument for the recycling of existing floorspace in order to improve the quality of the retail offer of Market Drayton, which may assist in raising the overall market share of the town in the comparison retail sector.**

The Town Centre Shopping Area – Market Drayton

- 6.20 The Town Centre Shopping Area in Market Drayton as identified in the North Shropshire Local Plan 200-2011 is extensive and includes all commercial retail floorspace, including the Morrisons store to the north of the town. The site at Frogmore Lane, which is under development currently for mixed uses including retail is within the defined Town Centre

⁷ Assumes a net:gross ratio of 80%

Shopping Area. WYG does not consider that there is any need for modification of the Town Centre Shopping Area in Market Drayton, unless the Council is seeking to identify a site outside of the existing boundary that could contribute to the qualitative need to increase the overall market share of the town. WYG considers that the extent of the Town Centre Shopping Area and the size of Market Drayton justify the introduction of a primary shopping area to identify the principal Class A1 frontages in the town. The primary shopping area should include: Shropshire Street, from its junction with Frogmore Road; High Street; Cheshire Street; and Queen Street. A plan indicating the suggested Primary Shopping Area of Market Drayton is outlined in Figure 6.1 below.

FIGURE 6.1: PLAN INDICATING THE SUGGESTED PRIMARY SHOPPING AREA OF MARKET DRAYTON



Whitchurch

Quantitative Retail Need – Whitchurch

- 6.21 Table 6.3 sets out the convenience and comparison retail need for Whitchurch Town Centre over the periods to 2013, 2018, 2023 and 2026. An allowance is made for existing convenience retail floorspace increasing its efficiency by 0.5% per annum. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum.

TABLE 6.3: QUANTITATIVE NEED – WHITCHURCH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WHITCHURCH AREA)

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
TURNOVER 2008	11.1	-	12.5	-
CAPACITY				
AT 2008				
BY 2013	0.9	75- 207	3.3	613- 875
BY 2018	1.8	147- 403	7.9	1,361- 1,945
BY 2023	2.7	215- 590	14.3	2,288- 3,268
BY 2026	3.3	259- 710	19.1	2,922- 4,174

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl

Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m based on WYG judgement
N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Convenience Goods

- 6.22 There is modest need for additional convenience floorspace of between 75 sq m (net) and 207 sq m (net) in the short-term to 2013. This level of need could be accommodated within the existing town centre by re-occupancy of vacant outlets. The vitality and viability assessment identified 3,050 sq m (gross) of vacant retail floorspace in the centre. Even in the ultra-long term (to 2026) there is an estimated requirement for between 259 sq m (net) and 710 sq m (net) of additional convenience floorspace, which could be accommodated either within existing vacant outlets or modest extension to existing provision.

Comparison Goods

- 6.23 In terms of comparison goods, Table 6.3 demonstrates a need, dependent upon the type of end operator, of between 613 sq m (net) and 875 sq m (net). This level of requirement could be accommodated by existing vacant floorspace already in the town centre. In the medium term, there is a need for between 1,361 sq m (net) and 1,945 sq m (net) of comparison goods floorspace. This could be delivered through existing vacant floorspace, or by an extension to an existing comparison outlet.
- 6.24 In the long term there may be capacity for up to 3,268 sq m (net) of comparison floorspace, which may increase to 4,174 sq m (net) of comparison floorspace. This would be sufficient to support a number of new, large comparison retail stores and an extension to the town centre.

Qualitative Retail Capacity – Whitchurch

6.25 Due to the undertrading of existing convenience floorspace in Whitchurch Town Centre there is no need for new convenience retail floorspace in the centre over the period to 2026. The increase in capacity identified over this period will be absorbed by the undertrading of existing stores. However as within Market Drayton, this is based on a constant market share and if the convenience retail offer in the town centre were to improve, this may increase capacity for convenience floorspace.

TABLE 6.4: QUALITATIVE CAPACITY – WHITCHURCH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WHITCHURCH AREA)

YEAR	CONVENIENCE	
	£(m)	Sq. m (net)
TURNOVER 2008	11.1	-
CAPACITY		
AT 2008	-8.3	-
BY 2013	-7.4	-
BY 2018	-6.5	-
BY 2023	-5.6	-
BY 2026	-5.0	-

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Commitments and the Requirement to Identify Sites – Whitchurch

6.26 The Council has granted outline planning permission for five comparison retail units at Waymills, 1.0km to the east of Whitchurch. The retail units permitted have a gross floorspace of 2,928 sq. m. If it is assumed that 80% of the gross floorspace in these units is used as sales area, the total sales area will be 2,342 sq. m. The sales area that is likely to be provided at Waymills can be compared with the quantitative need assessment for additional comparison retail floorspace, which is summarised by Table 6.3. Table 6.3 identifies that there is a need for up to 1,945 sq. m of sales area by 2018. **The commitment at Waymills will meet the need beyond 2018 and potentially to 2023. On this basis, there is no requirement for the Council to identify additional sites for new comparison retail floorspace until 2019 at the earliest.**

6.27 There is no reason for the Council to identify additional sites for comparison retail floorspace, on the basis that Whitchurch maintains its market share within this sector. However, as discussed above in respect of Market Drayton there is a qualitative argument for improving the comparison retail offer of the North Shropshire area to increase the retention of expenditure and reduce leakage. The North Shropshire area retains currently 30% of the comparison retail expenditure generated within it. An area of the character of North Shropshire could be able to retain up to 50% of comparison goods expenditure. **To increase the retention rate in North Shropshire from 30% to 50% would require considerable additional comparison retail floorspace and would need to be planned for over a long**

period of time. Whitchurch, as well as Market Drayton, could be an appropriate centre in which to plan for some uplift in market share. However, the Council should consider whether there are prospects realistically of increasing market share and finding suitable sites that contribute to the vitality of the town centre rather than allowing out-of-centre provision.

6.28 There are not any commitments in Whitchurch for additional convenience retail floorspace. However, Table 6.4 identifies that, **as a result of undertrading at existing convenience retail floorspace in the town, there is not any need for the Council to identify sites for new convenience retail floorspace.** Growth in convenience retail expenditure directed to existing floorspace without this having an adverse effect on the service offered to shoppers.

6.29 WYG does not find any requirement in Whitchurch to identify sites for new retail development of either a comparison or convenience retail nature to facilitate the town retaining its current market share and benchmark position. There is a qualitative argument for seeking to increase the proportion of comparison retail expenditure that is retained within the North Shropshire area. To achieve a retention rate of up to 50% would require considerable additional floorspace in Whitchurch, in addition to Market Drayton, and the Council should consider whether, in the long term, there is scope to identify sites sufficient to increase market share retention rate of the principal towns.

*The Town Centre Shopping Area - **Whitchurch***

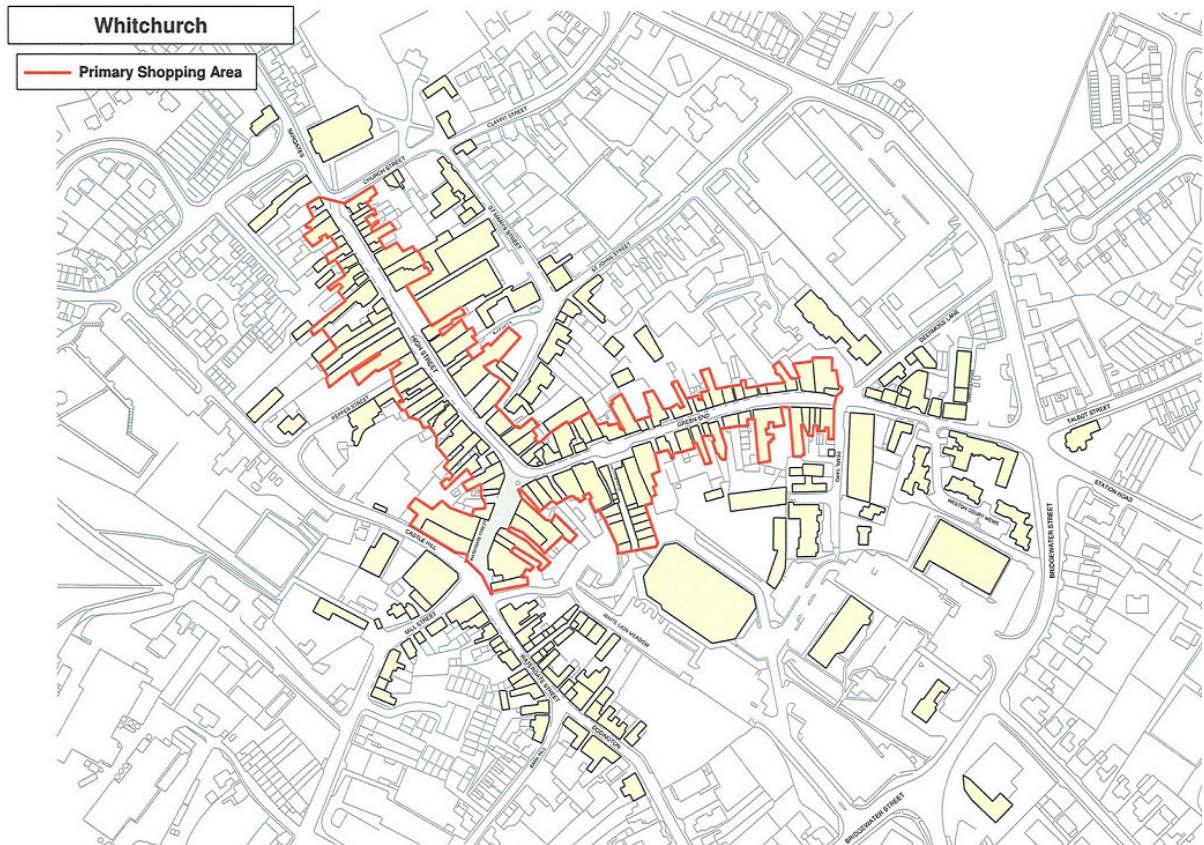
6.30 The Town Centre Shopping Area in Whitchurch as identified in the North Shropshire Local Plan 2000-2011 is extensive and includes all commercial activity to the west of Bridgewater Street and Brownlow Street and to the north of Highgate and Rosemary Lane. WYG considers that the Council should reduce the Town Centre Shopping Area in size and rename it the 'Town Centre'. WYG also considers it would be sensible to introduce a primary shopping area, to identify the principal Class A1 frontages in the town.

6.31 With regard to the 'Town Centre', the limited extension of the Town Centre Shopping Area to the east side of Brownlow Street is incongruous and WYG considers that it would be sensible to use Brownlow Street and Bridgewater Street as the outer boundary of the redefined 'Town Centre'. To the opposite side of the town, there is little commercial activity to the south of Castle Hill and Watergate Road and WYG considers that the reclassified 'Town Centre' could be reduced in size to accord with this. The boundary of the Town Centre Shopping Area in the north of the town, in the vicinity of the Civic Centre, is appropriate.

6.32 WYG considers that the primary shopping area should extend to: High Street (from Church Street to Green End); Watergate Street (from Bark Hill to High Street); and Green End (from

High Street to Pearl Yard). A plan indicating the suggested Primary Shopping Area of Whitchurch Town Centre is outlined in Figure 6.2:

FIGURE 6.2: PLAN INDICATING THE SUGGESTED PRIMARY SHOPPING AREA OF WHITCHURCH



Wem

Quantitative Retail Need – Wem

- 6.33 Table 6.5 sets out the convenience and comparison retail need for Wem Town Centre over the periods to 2013, 2018, 2023 and 2026. An allowance is made for existing convenience retail floorspace increasing its efficiency by 0.5% per annum. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum.

TABLE 6.5: QUANTITATIVE NEED – WEM TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WEM AREA)

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
TURNOVER 2008	3.5	-	3.2	-
CAPACITY				
AT 2008				
BY 2013	0.3	25- 69	0.9	167- 239
BY 2018	0.5	41- 112	2.1	362- 517
BY 2023	0.8	64- 175	3.7	592- 846
BY 2026	1.0	79- 215	5.0	795- 1,093

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
 Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m based on WYG judgement
 N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Convenience Goods

- 6.34 There is limited need for additional convenience goods floorspace in the town in the short to medium term. The need identified over the period to 2018 is sufficient only to support a modest extension to existing provision of up to 112 sq. m (net) of additional floorspace. This could be met within existing vacant outlets in the town centre, with some 590 sq m (gross) of vacant floorspace in the town centre (according to Experian Goad). In the long term (to 2023) and the ultra-long term (to 2026) the capacity for new comparison floorspace increases to 175 sq. m (net) and 215 sq m (net) of additional convenience floorspace respectively.

Comparison Goods

- 6.35 Based on current market share, there is capacity for between 167 sq m (net) and 239 sq m (net) in the short term to 2013. This increases to between 362 sq m (net) and 517 sq m (net) in the medium term, to between 592 sq m (net) and 846 sq m (net) in the long term and to between 795 sq m (net) and 1,093 sq m (net) in the ultra-long term. In the short to medium term the level of capacity identified could be met by existing vacant outlets in the centre or by extending the floorspace of existing outlets. In the long and ultra-long term, although these figures are indicative only, there may be scope to expand the town centre.

Qualitative Retail Capacity – Wem

- 6.36 Existing convenience floorspace in Wem Town Centre is undertrading by £1.5m. This is largely due to the Co-op Foodstore outlet at Morris Central Shopping Park which accounts for some £1.2m of the undertrading recorded. As a result, there is no capacity for new floorspace over the period of the Study, as indicated by Table 6.6 below.

TABLE 6.6: QUALITATIVE CAPACITY – WEM TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WEM AREA)

YEAR	CONVENIENCE	
	£(m)	Sq. m (net)
TURNOVER 2008	3.5	-
CAPACITY		
AT 2008	-1.5	-
BY 2013	-1.3	-
BY 2018	-1.0	-
BY 2023	-0.7	-
BY 2026	-0.5	-

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
 N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Commitments and the Requirement to Identify Sites – Wem

6.37 There are currently no commitments for retail floorspace in Wem. Table 6.6 identifies that existing convenience retail floorspace in Wem is undertrading to the extent that growth in spending pro-rata to the market share of the town over the period to 2026 can be absorbed by existing floorspace. **There is not a requirement for the Council to identify sites for any additional convenience retail floorspace.**

6.38 Table 6.5 identifies that there is a demonstrable need for additional comparison retail floorspace in the town. There are four vacant units in Wem with a total gross floorspace of 590 sq. m. The four units vacant represent 4.6% of the units in the town and 4.3% of the floorspace. The vacant outlets are at: 22, 29 (which is understood to have been vacant for three years) and 71 High Street; and 67 Aston Street. The Aston Street unit is an irregular shape and a potential long-term vacancy. The High Street units are of different sizes but central to Wem and are generally not likely to be vacant for any considerable period of time. In any centre there will always be a natural rotation of units falling in and out of being vacant for reasons of businesses changing, refurbishment and redevelopment.

6.39 **Given the limited number of vacancies in Wem, it is appropriate for the Council to consider sites that could deliver additional comparison retail floorspace pursuant to meeting the need identified.** The need for additional floorspace is small-scale in the short term and would be satisfied by one or two small unit shops. The need identified in the longer term is sufficient to justify a number of small-format shop units or up to two larger format units.

6.40 WYG has identified a number of potential sites for new retail floorspace:

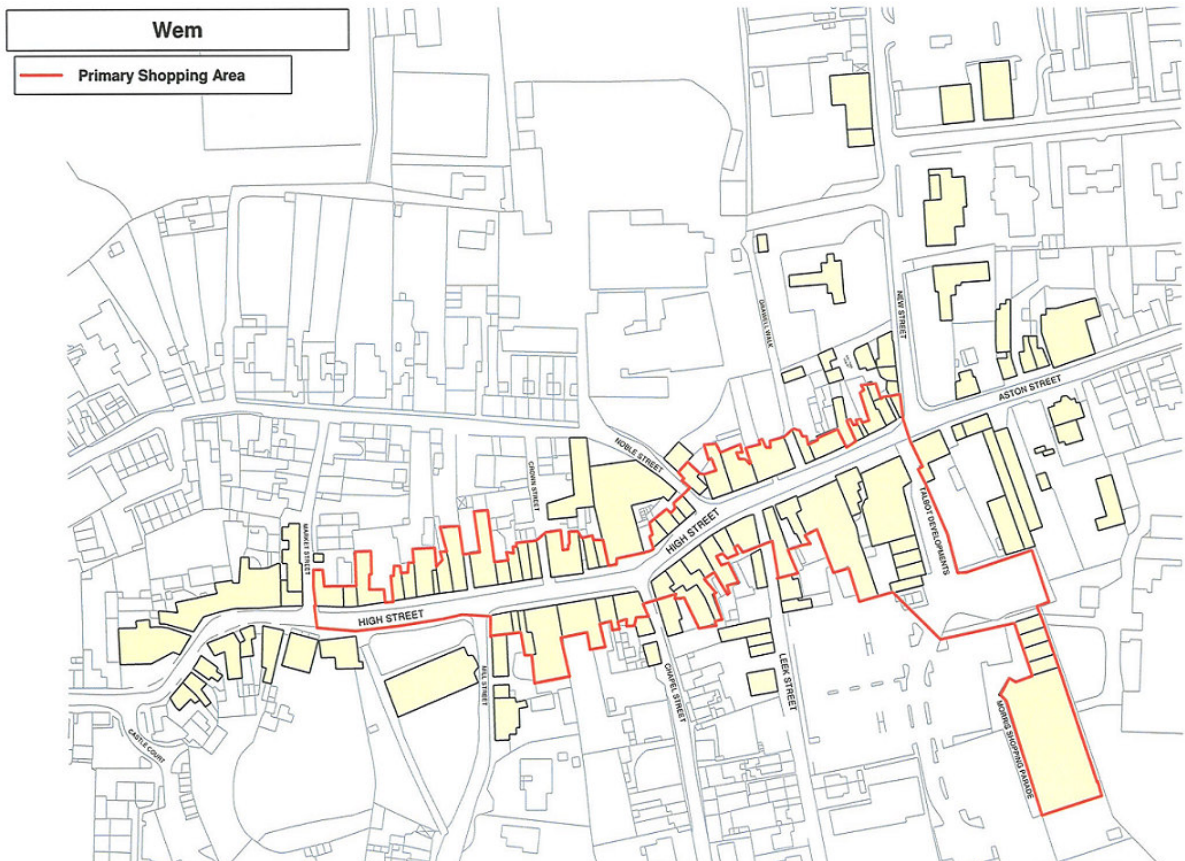
- Welch and Phillips Builders' Yard – New Street, Wem;
- Wem Motors area, New Street, Wem; and
- Car Park, Lorry Park and Bus Station, Morris Shopping Parade, Wem.

6.41 Each of these sites is suitable and viable for the extension of comparison shopping facilities in the town. The availability of sites is unknown and will require further research from the Council to determine whether the redevelopment of these sites is a realistic prospect. One of the three sites is likely to be of a sufficient size to meet the identified need. There is little to choose between the three sites, but proximity to existing retail facilities would favour an extension to the Morris Shopping Parade if alternative parking provision could be provided elsewhere to displace spaces lost. The Council should seek to identify a site of up to 0.5 ha to meet the need identified.

The Town Centre Shopping Area – Wem

6.42 The Town Centre Shopping Area as identified in the North Shropshire Local Plan 2000-2011 in Wem should be redefined as the 'Town Centre'. It is appropriate to introduce a primary shopping area, to identify the principal Class A1 shopping frontages. WYG considers that the primary shopping area should include: High Street (between Market Street and Talbot Developments); and the Morris Shopping Parade. Figure 6.3 illustrates the extent of the suggested Primary Shopping Area of Wem.

FIGURE 6.3: PLAN INDICATING THE SUGGESTED PRIMARY SHOPPING AREA OF WEM



Ellesmere

Quantitative Retail Need – Ellesmere

- 6.43 Table 6.9 sets out the convenience and comparison retail need for Ellesmere Town Centre over the periods to 2013, 2018, 2023 and 2026. An allowance is made for existing convenience retail floorspace increasing its efficiency by 0.5% per annum. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum.

TABLE 6.7: QUANTITATIVE NEED – ELLESMERE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE ELLESMERE AREA)

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
TURNOVER 2008	1.4	-	1.4	-
CAPACITY				
AT 2008				
BY 2013	0.1	8- 23	0.4	74- 106
BY 2018	0.2	16- 45	0.9	155- 222
BY 2023	0.3	24- 66	1.6	226- 366
BY 2026	0.4	31- 86	2.1	321- 459

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
 Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m based on WYG judgement
 N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Convenience Goods

- 6.44 It is apparent from Table 6.7 that there is a limited requirement in for new convenience floorspace in Ellesmere Town Centre over the period of Study, due to its modest market share of food shopping trips. In the short term, between 8 sq m (net) and 23 sq m (net) of convenience floorspace is identified, which could be met by a modest extension to existing floorspace or by existing vacant outlets in the centre, which occupy 800 sq m (gross) of floorspace currently. Even in the ultra-long term, capacity is only identified to increase to up to a maximum of 86 sq m (net).

Comparison Goods

- 6.45 There is similarly limited need for additional comparison retail floorspace. There is identified need for between 74 sq m (net) and 106 sq m (net) in the short-term, which could be accommodated within existing vacant outlets in the centre or by an extension to an existing outlet. In the medium term there is capacity of up to 222 sq m (net), in the long- term to up to 366 sq m (net), and in the ultra-long term up to 459 sq m (net)

Qualitative Retail Capacity – Ellesmere

- 6.46 The statistical analysis notes that convenience floorspace within Ellesmere Town Centre is undertrading at the current time by £1.5m. In light of this, any increase in capacity over the

period to 2026 is absorbed by this undertrading, and there is no qualitative need for additional floorspace over the period.

TABLE 6.8: QUALITATIVE CAPACITY – ELLESMERE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSFACE IN THE ELLESMERE AREA)

YEAR	CONVENIENCE	
	£(m)	Sq. m (net)
TURNOVER 2008	1.4	-
CAPACITY		
AT 2008	-1.5	-
BY 2013	-1.4	-
BY 2018	-1.3	-
BY 2023	-1.2	-
BY 2026	-1.1	-

Average Sales Density Convenience - Assumed to be £11,637/ sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007) or £4,250/sq m, which is based on the average sales density of smaller format retailers including Co-op, Somerfield, Iceland, Aldi, Netto and Lidl
N.B. Average Sales densities beyond 2008 also factor in floorspace efficiencies

Commitments and the Requirement to Identify Sites – Ellesmere

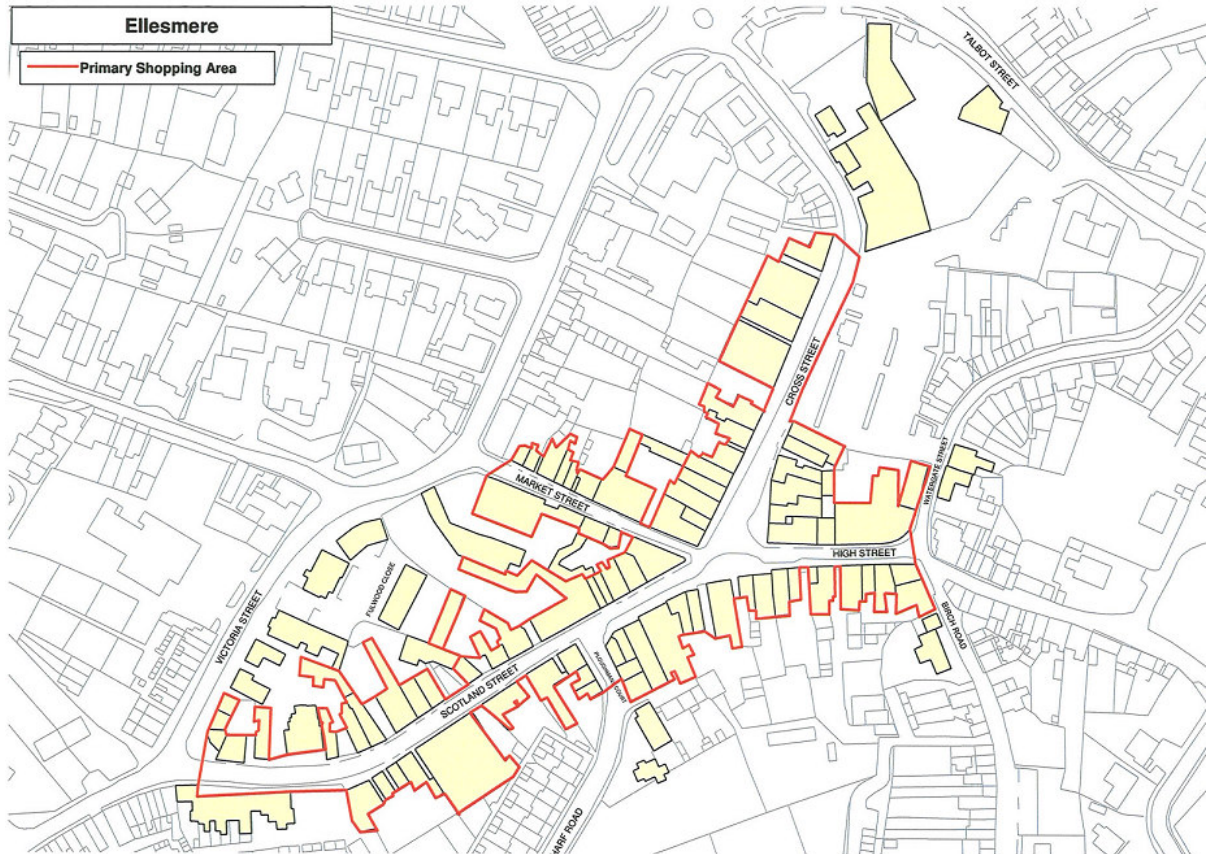
- 6.47 The Council granted planning permission in April 2007 for a mixed use development at Ellesmere Wharf, a former dairy at Wharf Road. There not any other commitments for additional convenience or comparison retail floorspace in Ellesmere.
- 6.48 The Ellesmere Wharf mixed use development comprises: residential; community uses; retail; a café/restaurant; a public house/restaurant; and live/work units. **The retail floorspace committed at Ellesmere Wharf is for a foodstore with a sales area of 1,625 sq. m.** It is likely that a proportion of this sales area will be uses for the sale of comparison goods and for the purpose of this assessment it is assumed that 20% of the floorspace (325 sq, m) will be used for the sale of comparison goods. If this magnitude of floorspace is used for the sale of comparison goods, then the scheme will meet the identified need, as set out in Table 6.7, for additional comparison retail floorspace over the period to at least 2021 and to 2026 potentially. Table 6.8 identifies that there is not a need for any additional convenience retail floorspace. **On these bases, there is not a requirement for the Council to identify any additional sites in Ellesmere for new retail floorspace.**

The Town Centre Shopping Area – Ellesmere

- 6.49 The Town Centre Shopping Area as identified in the North Shropshire Local Plan 2000-2011 of Ellesmere is drawn tightly and, in the main, is framed by: Victoria Street; Willow Street to the west; Sparbridge and Talborth Street to the north; Watergate Street to the east; and the rear curtilages of properties on High Street and Scotland Street to the south of the town. WYG considers that the Town Centre Shopping Area should be redefined as the 'Town Centre' and there is some merit in considering the exclusion of all properties to the east of Watergate Street, which are peripheral to the town centre.

6.50 There is merit in the Council introducing a primary shopping area to define the greatest concentration of Class A1 retail uses. WYG considers that the primary shopping area should comprise: Scotland Street (from Victoria Street to Market Street); Market Street; High Street; and Cross Street. A plan indicating the extent of the suggested Primary Shopping Area of Ellesmere is contained at Figure 6.4.

FIGURE 6.4: PLAN INDICATING THE SUGGESTED PRIMARY SHOPPING AREA OF ELLESMERE



Overview

6.51 The retail assessment has demonstrated a generally poor performance by the convenience retail sector in the four towns. **The current role of Ellesmere and Wem is serving convenience shopping needs principally. Market Drayton and Whitchurch are strong convenience retail destinations and each has a large format foodstore, albeit these do not trade to full potential. The two larger towns of Market Drayton and Whitchurch also provide a comparison shopping role and attract a significant proportion of comparison retail expenditure generated in the North Shropshire area.** None of the centres competes effectively with higher order centres and the leakage of 70% of comparison retail expenditure to destinations outside of the North Shropshire area is demonstrable of a need for to plan over the long term for significant additional comparison retail floorspace to achieve a greater market share and retention of comparison retail spend.

- 6.52 The existing retail floorspace is undertrading, which means that growth in spending in the convenience retail sector, pro-rata to the market share of the existing centres, can be absorbed by existing floorspace. In Ellesmere, there is a significant commitment for new additional floorspace which further reduces the requirement to identify additional floorspace in the convenience retail sector.
- 6.53 In the comparison retail sector there is a demonstrable need for additional floorspace in all four towns. Existing commitments or developments under construction are likely to satisfy the need identified in Ellesmere, Market Drayton and Whitchurch well beyond the likely lifespan of this Study. Accordingly, WYG does not consider that there is a need to identify any additional retail sites in these centres in order that the centres retain their existing market shares.
- 6.54 The Council should consider a strategy to increase the retention of comparison retail expenditure in the North Shropshire area. This will require a long term strategy and considerable additional comparison retail floorspace that is best located in Market Drayton and Whitchurch. **The Council should consider fully the scope for long-term expansion of comparison retail floorspace in Market Drayton and Whitchurch, in order that an increase in market share and retention of expenditure on the Study Area is brought about.**
- 6.55 There are not any commitments for new comparison retail floorspace in Wem and there is a requirement for the Council to identify a site (or sites) that could meet the need identified. WYG has identified three possible sites, and of those identified WYG considers that an extension to the Morris Shopping Parade is the most appropriate development to plan for, albeit it is likely that alternative parking provision would need to be planned for.
- 6.56 With regard to the existing Town Centre Shopping Area in each of the four towns, WYG considers that in each town this should be renamed the 'Town Centre'. WYG has also suggested some consolidation of boundaries in Ellesmere and Whitchurch. In Market Drayton and Wem, the existing Town Centre Shopping Area in both instances is appropriate to redefine as the 'Town Centre'. WYG also recommends that the Council consider introducing a primary shopping area in each of the centres to accord with national planning guidance (PPS6) and to identify the principal concentration of Class A1 frontages.

GLOSSARY OF TERMS

Capacity -	Retail capacity in terms of this report refers to surplus/ deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods -	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6).
<i>Furniture Goods</i>	<i>Includes furniture and furnishings, carpets and other floor coverings</i>
<i>DIY Goods</i>	<i>Includes all materials for maintenance and repair of the dwelling, garden products, including plants and flowers</i>
<i>Electrical Goods</i>	<i>Includes audio visual equipment, photographic and optical equipment and information processing equipment</i>
<i>Clothing & Footwear</i>	<i>Includes clothing materials, garments, other articles of clothing/accessories, cleaning, repair and hire of clothing, shoes and other footwear and repair and hire of footwear</i>
<i>CDs, Books, etc.</i>	<i>Includes all recording media (e.g. CDs, DVDs, etc.) and books</i>
<i>Household Goods</i>	<i>Includes household textiles and soft furnishings; china, glass and utensils; jewellery, watches and clocks; and other miscellaneous goods</i>
<i>Recreational Goods</i>	<i>Includes bicycles, musical instruments, physical education and sport equipment, camping equipment, toys, Christmas decorations, board games, computer/video games, etc.</i>
<i>Chemist Goods</i>	<i>Includes prescription and non-prescription medical products, including vitamins, hot water bottles, first-aid kits, contact lenses, etc.</i>
Convenience Goods -	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6).

Expenditure -	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts -	<p>This assessment has been undertaken using the 'goods based' approach as prescribed in PPS6, the information on consumer retail expenditure forecasts have been derived from MapInfo Brief 07/02.</p> <p>Forecasts based on the anticipated increase in expenditure per annum for convenience and comparison goods as identified by MapInfo (+1.2% per annum for convenience goods and +5.3% per annum for comparison goods).</p>
Expenditure per caput -	This is the average spend of each person within the defined study area on a variety of retail goods.
Experian -	The database used to identify population, expenditure and socio-economic breakdown of the study area population.
Focus -	This is a database used to find office, industrial and retail availability in a certain area.
Goad -	This is a GIS based database displaying retail data regarding a particular town centre. The information can be displayed either as a plan or a spreadsheet.
Gross Floorspace -	This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
MHE -	Management Horizons Europe UK Shopping Index 2003/2004 is a database which helps one understand some of the key differences between UK shopping venues.
MapInfo -	This is a GIS based system, used to display information and manipulate data.
Market Share -	Market shares derived from the household survey results, which are based on the proportion of expenditure attracted to a particular centre/ facility.

National Multiple -	This is a retail or service operator which is or part of a network of nine or more outlets.
Net Floorspace -	This entails the level of internal area devoted to the sale of goods.
Need -	The requirement for new floorspace in order for a destination to maintain its current market share.
Price Base -	The price base for the study is 2004; all prices are or have been adjusted to 2004 in order to be consistent.
Quantitative Need -	Increase in consumer retail expenditure as a result of population growth and/or growth in spending per person of convenience or comparison retail goods. The overtrading of existing stores (in comparison with company benchmark figures) can also be part of quantitative need.
Qualitative Need -	The quality of existing provision. If a centre is over-provided for in terms of retail floorspace, which is undertrading, existing floorspace could be of sufficient quality to absorb identified quantitative need. Conversely, if existing floorspace is overtrading or there is a considerable leakage of expenditure to destinations outside of the Study Area this is demonstrative of a lack of quality in provision.
Sales Density -	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/ foot.
Study Area -	This represents the household survey area, which is based on postal sectors.
Turnover -	The turnover figure relates to the annual turnover generated by existing facilities.
Valuation Office Agency -	This displays prime retail yield data in shopping centres throughout England.

Commercial Yield -

This is the capital value in relation to the expected market rental value - the lower the yield the lower the perceived risk of investing in that centre.