Nathaniel Lichfield and Partners

Planning Design Economics

OSWESTRY BOROUGH COUNCIL

RETAIL STUDY UPDATE

March 2007
Amended December 2008

MA40259

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GLOSSARY OF TERMS

Class A1	Commercial units classed as retail or shop uses within the Use Classes Order.
Class A1 Services	Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.
Class A2	Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.
Class A3	Commercial units classed as restaurants or takeaways, within the Use Classes Order.
Class A4	Commercial units classed as drinking establishments, for example public houses or wine bars, within the Use Classes Order.
Class A5	Commercial units classed as hot food take-aways within the Use Classes Order.
Convenience Goods	Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods.
Higher order comparison goods	Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to / tend to travel further to purchase these items.
Lower order comparison goods	Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceuticals and toiletries. Customers are less likely to travel long distances to purchase these items.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Gross floorspace	Total external floorspace.
Multiple traders	National or regional *'chain store'* retailers.
Experian	A data consultancy who are widely used for retail planning information.
Goad Plans	Town centre plans prepared by Experian, which are based on occupier surveys of over 1,200 town centres across the country.
Zone A Rent	The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.
Market share Penetration rate	The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.
Focus Retail	A published source of information providing known retail and leisure operators space requirements in towns across the country.

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield and Partners have been commissioned by Oswestry Borough Council to prepare an assessment of the retail needs of the Borough. The study involves five main parts, as follows:

- Stage 1 – Data collection including household surveys
- Stage 2 – Oswestry town centre audit
- Stage 3 – Retail capacity assessment (convenience and comparison)
- Stage 4 – A review of potential retail development sites
- Stage 5 – Policy Review and recommendations

1.2 The main study objectives are to:

- Establish the comparison and convenience retail floorspace requirements up to 2021 for the Borough;
- Assess the vitality and viability of Oswestry town centre based on the criteria provided in Planning Policy Statement 6; and
- Identify the capacity of Oswestry to accommodate retail growth.

1.3 This study updates and supersedes the 2003 Oswestry Retail Study undertaken by Chesterton.

1.4 Since the original NLP Study was published in 2007, a small correction has been made to the comparison goods market shares which has resulted in a small increase in the future requirement for comparison goods than that previously forecast. This 2008 amendment therefore supersedes the 2007 edition. Convenience goods floorspace requirements remain unaffected by this amendment.

Content of the Report

1.5 Section 2.0 provides an overview of the national and local planning policy context. Section 3.0 provides a description of the shopping hierarchy in Oswestry and the surrounding area and a commentary on retail trends.

1.6 Section 4.0 summarises the results of the household surveys on shopping patterns. Section 5.0 provides the town centre health check for Oswestry.

1.7 Sections 6.0 and 7.0 set out an analysis of the qualitative and quantitative need for shopping within the Borough and assess the ability of existing facilities to meet the needs of the community.

1.8 Section 8.0 sets out our recommendations on growth strategies, floorspace requirements up to 2021 and Local Development Framework policy.

2.0 PLANNING POLICY CONTEXT

National Policy

Retail

2.1 Planning Policy Statement 6 (PPS6): *Planning for Town Centres* sets out the Government's policies on retail.

2.2 The Government's objectives are to promote the vitality and viability of town centres, by focussing development and growth in such centres and encouraging a wide range of services in a good environment, accessible to all (Para. 1.3).

2.3 Local planning authorities (LPAs) are advised in Paragraph 2.1 to adopt a proactive, plan-led approach to planning in town centres, in order to promote growth and manage change. LPAs should define a network and hierarchy of centres, which should perform their appropriate role to meet the needs of their catchment.

2.4 Paragraph 2.15 offers specific guidance on the role of local plans in retail development. LPAs should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local ones, setting out how the role of different centres will contribute to the overall spatial vision for the area. This approach requires LPAs to:

- Assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;
- Identify deficiencies in provision and assess the capacity of existing centres to accommodate new development;
- Identify the centres where development will be focussed, as well as the need for any new centres of local importance;
- Define the extent of the primary shopping area and town centre, for centres in their area;
- Identify and allocate sites in accordance with the sequential approach to site selection;

- Introduce criteria-based policies for assessing and locating new development proposals.

2.5 Paragraph 2.44 sets out the sequential approach to site selection for new retail development, where a need is identified for such new development. First preference must therefore be given to existing centres, where suitable sites or buildings suitable for conversion are available. If they are not, then consideration should be given to edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre. Only as a last resort should out-of-centre sites be considered, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre. In considering alternative sites with similar locational characteristics in terms of the sequential approach, LPAs should give weight to those locations which best serve deprived areas.

Transport

2.6 Planning Policy Guidance Note 13 (PPG 13): *Transport* sets out the Government's policies on transport.

2.7 The key objectives, as set out in Paragraph 4, are:

- Promote more sustainable transport choices for both people and for moving freight;
- Promote accessibility to jobs, shopping, leisure facilities and services by public transport, walking and cycling;
- Reduce the need to travel, especially by car.

2.8 In delivering the objectives of PPG13, in determining planning applications and preparing development plans, Paragraph 6 requires LPAs to:

- Focus major generators of travel demand in city, town and district centres, near to major public transport interchanges;
- Promote walking and cycling;
- Accommodate housing principally within existing urban areas;
- Give priority to people over ease of traffic movement and plan to provide more road space to pedestrians, cyclists and public transport;

- Ensure that transport is accessible to all, taking into account the needs of disabled and other less mobile people.

Regional Planning Context

West Midlands Regional Spatial Strategy (RPG June 2004)

2.9 Policy RR3 of the RSS states that market towns have a key role in the regeneration of rural areas, as a focus for sustainable economic and housing development and by providing services and other facilities to their rural hinterlands. Development plans should prioritise policies to provide sites and premises to support the expansion of existing businesses, improve the natural, built and historic environment and develop shopping and other key services and facilities within the town centre.

2.10 Policy PA11 sets out the network of town and city centres across the Region. Oswestry is not included in the network of 25 strategic centres, but is a centre which meets local needs, and as such should be maintained and enhanced through appropriate development.

Local Planning Context

Structure Plan

2.11 The Shropshire and Telford & Wrekin Joint Structure Plan was adopted in November 2002. The retail hierarchy of the Structure Plan area consists of three tiers of provision:

- **Sub-Regional Centres**: Telford and Shrewsbury
- **Market Towns**: including Oswestry, Ludlow and Bridgnorth
- **Villages and District Centres**: in Telford and Shrewsbury

2.12 Policy P27 of the Structure Plan states that "*market towns play an important role in the rural area. Town centre developments within market towns should be aimed primarily at satisfying needs which arise within their catchment area*".

Local Plan

2.13 The Oswestry Borough Local Plan was adopted in July 1999. Policy SP1 states that *"new shopping development within the Borough of Oswestry should be contained* *within the existing primary and secondary shopping frontages within the "Retail Development Area"*.

2.14 Policies SP2 and SP3 consider that proposals for foodstores and comparison shopping outside of the retail development area should be located in accordance with the sequential approach. The primary objective of the retail strategy is to ensure that the vitality and viability of Oswestry town centre is sustained and enhanced.

2.15 We provide further analysis and recommendations on updating these policies in section 8.0.

Oswestry Borough Local Development Framework

2.16 The Council is preparing a Local Development Framework (LDF) to replace the existing Local Plan, which is now at the end of its lifespan. A Core Strategy, a Site Allocations document and a Development Control Policies document are currently being produced. A combined Issues and Options Report for these three documents was published in 2005 and consulted on in February and March 2006.

3.0 THE SHOPPING HEIRARCHY AND RETAIL TRENDS

Shopping Centres in the Borough

3.1 Oswestry town centre is the main retail centre within the Borough.

3.2 Oswestry competes with other major shopping destinations in the sub-region including Shrewsbury, Wrexham, Welshpool and Telford.

3.3 Management Horizons' Europe UK Shopping Index 2003/2004 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. The Index ranks Oswestry 313rd out of 1,672 centres across Great Britain, placing it above Newtown and Welshpool but below Wrexham.

3.4 Management Horizon's rank for other shopping centres in and around the study area is shown in table 3.1.

Table 3.1: Management Horizons UK Shopping Index 2003/04

MHE Venue	Location Grade	2003-2004 Ranking	MHE Index Score 2003-2004	Rank Change 2003-04 from 2000-01
Chester	Major Regional	22	229	Going Down
Shrewsbury	Regional	86	150	Going Down
Crewe	Regional	122	126	Going Up
Telford	Sub-Regional	140	118	Going Down
Wrexham	Sub-Regional	152	115	Going Up
Oswestry	**Major District**	**313**	**62**	**Going Down**
Newtown	District	538	36	Going Down
Welshpool	Minor District	664	28	Going Up

New Forms of Retailing

3.5 New forms of retailing have emerged in recent years as an alternative to traditional shopping facilities. For example, factory outlet centres have been developed across the UK as an alternative to fashion shops within town centres. These developments are usually large and can provide over 10,000sq m of comparison retailing, focusing primarily on fashion items and clothing, offering designer clothing at discounted prices. A number of large factory outlet developments have emerged across Great Britain and draw from a wide catchment area, for example the Cheshire Oaks Outlet Village near Chester.

3.6 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing in Oswestry. It will therefore be necessary to monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

3.7 In broad terms home/electronic shopping is classified by Experian as "*Special Forms of Trading*", which also includes other forms of retail expenditure not spent in shops e.g. mail order and markets. Special forms of trading have been excluded from the quantitative capacity analysis of this study.

3.8 The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. However, there is no clear evidence of the likely extent of this growth in the long term.

3.9 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990's. Retailers also responded to stricter planning controls by changing their formats. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as Tesco *Metro*, Sainsbury *Central/Local* store and Marks and Spencer's *Simply Food* formats. Food operators have also entered the local convenience store market, for example *Tesco Express* store and convenience stores linked with petrol filling stations. The entry of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

3.10 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

3.11 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY and Homebase's take-over of Texas. Other traditional high street retailers have sought large out-of–centre stores, for example Big W (Woolworth), Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre. These trends have already been evident across the UK.

3.12 Within town centres, some high street multiple comparison retailers have also changed their format. High street national multiples have increasingly sought larger modern shop units over 200 sq m, (2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in Oswestry. Some town centres may have limited sites suitable for large stores and there are conservation and design issues that may affect the alteration of shop premises to provide larger units. Operator demand for floorspace may continue to be concentrated within major centres i.e. Shrewsbury, Wrexham and Telford, rather than smaller centres.

4.0 HOUSEHOLD SURVEY

Survey Structure

4.1 NEMS Market Research carried out a telephone survey of 1,000 households in the study area in August 2006. The geographical extent of the study consisted of 8 zones based on postcode boundaries.

4.2 The 8 zones are:

- Zone 1 – Overton/Ruabon
- Zone 2 – Cefn Mawr/Pontfadog
- Zone 3 – Gobowen
- Zone 4 – St Martins/Ellesmere
- Zone 5 – Oswestry Town Centre
- Zone 6 – Wittington/West Felton
- Zone 7 – Baschurch
- Zone 8 – Pant/Llanfyllin

4.3 These replicate the zones of the previous 2003 retail study. The main aims of the survey were to establish patterns for the following:

- Main food and grocery shopping;
- Top-up food and grocery shopping; and
- Non-food shopping, including:
    - Clothing and footwear;
    - Furniture, soft furnishing, household textiles;
    - DIY and garden goods
    - Audio-visual equipment
    - Domestic electricals and other durable goods;
    - Health and beauty items; and
    - Other non-food items such as books and CDs.

4.4 Households were selected to ensure that a representative sample was obtained. Interviews were conducted with the person responsible for the majority of food shopping within each household.

Food and Grocery Shopping

Main Food Shopping

4.5 Table 4.1 shows the main food shopping destinations of the respondents in each zone. The north and south east areas of the catchment are mostly served by foodstores out of the study area, i.e. in Shrewsbury and Wrexham. Zones 3, 5, 6 and 8 represent the primary catchment area of Oswestry.

Table 4.1: Main Food Shopping Destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Sainsbury Oswestry	1%	8%	47%	19%	51%	54%	6%	31%
Somerfield, Oswestry	1%	3%	15%	6%	21%	18%	2%	8%
Iceland,Oswestry	1%	2%	1%	0%	2%	0%	0%	1%
Co-op Oswestry	0%	0%	0%	0%	0%	0%	0%	0%
Aldi, Oswestry	2%	1%	8%	4%	8%	12%	2%	8%
Kwik Save, Oswestry	0%	1%	3%	1%	4%	1%	0%	2%
Oswestry Sub Total	4%	14%	73%	31%	86%	85%	9%	51%
Stans Supermarket, St Martins	2%	5%	6%	21%	0%	0%	0%	0%
Local Shops	0%	0%	1%	1%	1%	1%	0%	0%
Pant	0%	0%	1%	0%	0%	0%	0%	0%
Gobowen	0%	0%	0%	1%	0%	0%	0%	0%
Other Study area	3%	15%	1%	7%	0%	0%	0%	6%
Wrexham	83%	53%	8%	15%	7%	4%	0%	0%
Shrewsbury	0%	1%	6%	18%	4%	7%	83%	9%
Welshpool	0%	0%	2%	1%	1%	0%	0%	33%
Other outflow	7%	12%	2%	6%	0%	2%	8%	1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.6 Sainsbury's in Oswestry has maintained its position as the main food shopping destination in Oswestry, and has increased its market share slightly in Zones 2, 3, 5 and 6, although its share has decreased in Zones 4, 7 and 8 since the 2002 Chesterton Study was undertaken. Somerfield has also lost market share in Zones 3, 5 and 8 since 2002, but held its position in Zones 4 and 6. Stans Supermarket in St Martins has increased its market share in Zone 4.

Top-Up Shopping

4.7 Respondents were also asked which shops they use regularly (if any) for top up shopping, to ensure that a true representation of shopping patterns was ascertained. Table 4.2 shows the responses for top up food shopping, again demonstrating cross flows of expenditure between the zones.

Table 4.2: Top-Up Food Shopping Destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Sainsbury Oswestry	0%	1%	26%	8%	25%	25%	4%	5%
Somerfield, Oswestry	0%	0%	8%	2%	14%	9%	0%	2%
Iceland, Oswestry	0%	1%	0%	1%	0%	6%	0%	3%
Co-op Oswestry	0%	1%	3%	2%	34%	2%	0%	0%
Aldi	0%	0%	1%	2%	1%	1%	0%	3%
Kwik Save, Oswestry	0%	0%	5%	0%	6%	0%	0%	0
Oswestry Sub Total	0%	3%	43%	15%	80%	44%	4%	13%
Stans Supermarket	1%	6%	18%	26%	1%	0%	0%	2%
Local Shops	3%	1%	11%	0%	16%	23%	2%	3%
Pant	0%	0%	5%	0%	0%	8%	0%	3%
Gobowen	0%	0%	8%	7%	0%	6%	0%	0%
Other Study area	38%	63%	11%	47%	0%	14%	45%	77%
Wrexham	43%	11%	0%	1%	0%	0%	0%	0%
Shrewsbury	0%	1%	0%	2%	1%	6%	40%	0%
Welshpool	0%	0%	0%	0%	0%	0%	0%	0%
Other outflow	14%	15%	4%	2%	1%	0%	9%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.7.1 For top-up food shopping, Sainsbury's in Oswestry maintained its position as the main destination in Oswestry. It increased its market share since 2002 in all Zones except 1 and 2, where the same level of market share was retained. Somerfield increased its market share slightly in Zones 3, 5 and 8, with a small decrease in Zone 6. Stans Supermarket increased its market share in Zones 2, 3, 4 and 5.

Non-Food Shopping

4.8 Respondents were asked a series of questions about where they shopped for a number of different comparison goods items. For shoppers from Zones 3 and 5, Oswestry town centre was the most popular destination for clothing and footwear items, for Zones 1 and 2 it was Wrexham, and for Zones 4, 6, 7 and 8 it was Shrewsbury.

Table 4.3: Main Clothes/Footwear Shopping Destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Oswestry	3%	12%	31%	19%	33%	28%	13%	25%
Ellesmere	1%	0%	0%	2%	1%	0%	0%	0%
Llanfyllin	0%	0%	0%	0%	0%	0%	0%	0%
Gobowen	0%	0%	0%	0%	0%	0%	0%	0%
Pant	0%	0%	0%	0%	0%	0%	0%	0%
Other in study area	1%	1%	0%	0%	0%	0%	0%	0%
Wrexham	53%	54%	19%	23%	17%	13%	2%	9%
Shrewsbury	1%	1%	26%	32%	28%	38%	57%	40%
Welshpool	0%	0%	0%	0%	0%	1%	0%	4%
Chester	28%	20%	16%	13%	14%	12%	7%	9%
Other Outflow	13%	12%	8%	11%	6%	8%	21%	13%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.9 Oswestry's market share for clothing and footwear items from the core Zones of 3, 5, 6 and 8 ranges from 25% – 33%. Shrewsbury's share from these zones ranged from 26% - 40%, with 9% – 19% market share to Wrexham.

Table 4.4: Furniture/flooring/household textiles shopping destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Oswestry (including Penda Retail Park)	4%	7%	39%	22%	43%	31%	11%	23%
Ellesmere	0%	1%	0%	0%	0%	0%	0%	0%
Llanfyllin	0%	0%	0%	0%	0%	0%	0%	0%
Gobowen	0%	0%	0%	0%	0%	0%	0%	0%
Pant	0%	0%	0%	0%	0%	0%	0%	0%
Other in study area	1%	2%	1%	0%	1%	1%	0%	5%
Wrexham	50%	54%	11%	16%	14%	8%	0%	5%
Shrewsbury	4%	4%	25%	36%	28%	40%	66%	40%
Welshpool	0%	0%	0%	0%	0%	0%	0%	5%
Chester	32%	24%	15%	15%	7%	14%	6%	9%
Other Outflow	9%	8%	8%	12%	7%	7%	17%	13%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.10 For furniture, flooring and household textiles, Oswestry town centre and the larger centres outside of the study area continued to prove popular destinations. However, Oswestry town centre was slightly more popular than it had been for clothing and footwear with retention up to 43% in Zone 5 and 39% in Zone 3.

Table 4.5: Audio-visual equipment and other durable goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Oswestry	4%	14%	55%	26%	60%	46%	8%	37%
Ellesmere	1%	0%	0%	9%	0%	0%	0%	0%
Llanfyllin	0%	0%	0%	0%	0%	0%	0%	2%
Gobowen	0%	0%	0%	0%	0%	0%	0%	0%
Pant	0%	0%	0%	0%	0%	0%	0%	0%
Other in study area	1%	6%	0%	0%	0%	0%	0%	0%
Wrexham	70%	63%	19%	24%	15%	16%	0%	8%
Shrewsbury	1%	3%	14%	25%	15%	27%	79%	38%
Welshpool	0%	0%	0%	0%	0%	0%	0%	8%
Chester	19%	13%	6%	8%	6%	6%	0%	3%
Other Outflow	5%	2%	6%	8%	3%	5%	14%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.11 For audio-visual equipment and other durable goods, Oswestry town centre was the most popular destination, and attracted 60% of expenditure from within its own zone and 55% from Zone 3. Wrexham attracted the majority of shoppers from Zones 1 and 2, and Shrewsbury drew the majority of trade from Zones 7 and 8.

Table 4.6: DIY/hardware goods shopping destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Oswestry (including Penda Retail Park)	6%	18%	58%	38%	63%	58%	10%	42%
Ellesmere	2%	0%	0%	3%	0%	0%	0%	0%
Llanfyllin	1%	0%	1%	8%	0%	0%	0%	6%
Gobowen	0%	0%	1%	0%	0%	0%	0%	0%
Pant	0%	0%	0%	0%	0%	0%	0%	0%
Other in study area	4%	13%	8%	4%	3%	2%	7%	5%
Wrexham	70%	63%	20%	25%	15%	11%	0%	5%
Shrewsbury	3%	2%	6%	19%	13%	25%	74%	17%
Welshpool	0%	0%	2%	0%	2%	2%	0%	20%
Chester	9%	3%	1%	1%	3%	0%	0%	1%
Other Outflow	5%	1%	3%	4%	1%	3%	9%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.12 For DIY and hardware goods, Oswestry town centre performed an even stronger role, and attracted 63% of expenditure from within its own zone and rated over 50% in Zones 3 and 6. The higher market share commanded by Oswestry across all zones (compared to the Chesterton Study in 2002), is likely to be a reflection of the recent development at Penda Retail Park, which includes a Focus DIY store. Within the study area, the local centres attracted a small number of shoppers. Wrexham was a popular destination for Zones 1 and 2, as was Shrewsbury for Zone 7.

Table 4.7: Health and Beauty shopping destinations

	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**
Oswestry	3%	20%	70%	44%	72%	64%	21%	52%
Penda Retail Park, Oswestry	0%	0%	0%	0%	0%	0%	0%	0%
Ellesmere	1%	0%	1%	17%	0%	0%	0%	0%
Llanfyllin	0%	0%	1%	0%	0%	0%	0%	7%
Gobowen	0%	0%	1%	0%	0%	0%	0%	0%
Pant	0%	0%	1%	0%	0%	0%	0%	0%
Other in study area	12%	19%	0%	2%	0%	0%	0%	1%
Wrexham	66%	50%	11%	15%	10%	3%	0%	2%
Shrewsbury	1%	0%	7%	15%	12%	26%	78%	14%
Welshpool	0%	0%	0%	0%	0%	1%	0%	19%
Chester	13%	6%	5%	4%	4%	4%	0%	1%
Other Outflow	5%	4%	2%	4%	1%	3%	1%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.13 For health and beauty items, Oswestry town centre again performed strongly, drawing the majority or largest proportion of shoppers from Zones 3, 4, 5, 6 and 8. However, shoppers were more likely to shop in their own zones for health and beauty items than many other non-food items. For example, in Zone 4, Ellesmere was the most popular destination for 17% shoppers, and in Zone 8, Llanfyllin was the most popular destination for 7%.

Table 4.8: Other non-food items shopping destinations

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Oswestry	5%	19%	48%	32%	60%	44%	13%	31%
Penda Retail Park, Oswestry	0%	0%	0%	0%	0%	0%	0%	0%
Ellesmere	1%	0%	0%	2%	0%	0%	0%	0%
Llanfyllin	0%	0%	0%	0%	0%	0%	0%	1%
Gobowen	0%	0%	0%	0%	0%	0%	0%	0%
Pant	0%	0%	1%	0%	0%	0%	0%	0%
Other in study area	0%	4%	0%	1%	0%	1%	2%	0%
Wrexham	69%	58%	18%	24%	10%	10%	4%	6%
Shrewsbury	1%	0%	20%	29%	17%	31%	76%	33%
Welshpool	0%	0%	0%	0%	1%	0%	0%	18%
Chester	17%	16%	10%	3%	5%	7%	2%	4%
Other Outflow	6%	3%	4%	10%	5%	7%	2%	6%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: NEMS Household Survey 2006, columns may not add up due to rounding.

4.14 For other non-food items, such as books, toys, CDs and gifts. Oswestry town centre was the most popular destination, and attracted 60% of expenditure from within its own zone and rates of 48% and 44% in Zones 3 and 6 respectively. Wrexham attracted the majority of shoppers from Zones 1 and 2, and Shrewsbury drew the largest proportion of trade from Zones 7 and 8.

5.0 OSWESTRY TOWN CENTRE HEALTHCHECK

Mix of Uses and Occupier Representation

5.1 Oswestry town centre has a good number of retail and service uses, serving the main requirements of the town and local catchment. Its key roles include:

- *convenience shopping* – serving the local population; includes a Sainsbury's, Somerfield, Aldi, Kwik Save, Cool Trader and Iceland, and a number of convenience stores and grocers.
- *comparison shopping* – serving a wider catchment, including national multiples such as WH Smiths, New Look, Argos, Superdrug, Woolworths and Boots, as well as a wide range of independent retailers.
- *services* – includes a number of high street national banks, a number of cafés, restaurants and takeaways and several hair salons.

5.2 Oswestry town centre has 310 ground floor retail/service units. Table 5.1 sets out the mix of uses in the town centre, compared with the national average based on Experian Goad data.

Table 5.1: Oswestry Town Centre Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Oswestry Town Centre	National Average*
Comparison Retail (most non-food goods)	154	50	48
Convenience Retail (mainly food and drink)	31	10	9
A1 Services (e.g. hairdressers, travel agents)	30	10	11
A2 Services (e.g. banks, estate agents)	26	8	9
A3/A5 (excluding pubs)	27	9	13
Vacant	42	14	10
Total	**310**	**100.0**	**100.0****

Sources: Goad Town Centre Report
** National average relates to all town centres surveyed by Goad Plans (January 2005)*
*** Total may not add up to 100 due to rounding*

5.3 The mix of uses in Oswestry town centre is broadly similar to the national average for all town centres, although the proportion of convenience retail use is slightly above the national average. Conversely, there is a lower proportion of A2 uses. The proportion of vacant uses is above the national average.

Retailer Representation

5.4 Table 5.2 provides a breakdown of comparison shop uses by goods categories.

5.5 All comparison goods categories identified by Experian Goad are represented within the town centre, and there is a reasonable choice of shops within each category. The table reveals that Oswestry town centre has a disproportionately low number of clothing and footwear shops compared to the national average. There is a high proportion of furniture and carpet shops in the town but most other specialist categories have a level of representation broadly in line with what would be expected, based on a comparison with the national average.

Table 5.2: Oswestry Town Centre Breakdown of Comparison Units

Type of Unit	**Oswestry Town Centre**		**National Ave.***
	Units	%	%
Clothing and Footwear	31	20	28
Furniture, carpets and textiles	29	19	9
Booksellers, arts, crafts and stationers	10	6	9
Electrical, gas, music and photography	15	10	10
DIY, hardware & homewares	8	5	6
China, glass, gifts & fancy goods	8	5	4
Cars, motorcycles & motor access.	7	5	3
Chemists, drug stores & opticians	11	7	8
Variety, department & catalogue	5	3	2
Florists, nurserymen & seedsmen	5	3	2
Toys, hobby, cycle & sport	6	4	6
Jewellers	5	3	5
Other comparison retailers	14	10	8
Total	**154**	**100.0**	**100.0****

Source: Goad Town Centre Report
** National average relates to all town centres surveyed by Goad Plans (October 2005)*
*** Total may not add up to 100 due to rounding*

5.6 There are a number of national multiples present in Oswestry town centre, including WH Smith, Argos, Boots and Woolworths. Independent traders also have an important role to play in the centre and are represented by a number of niche stores as well as the indoor and outdoor market. Recent changes in premises have included the relocation of Wilkinsons to a new larger store on the New Street and the opening of Peacocks and Bonmarche units at the former Littlewoods store.

5.7 EGi notes 12 retailer requirements listed in the last 12 months for premises in Oswestry. These are:

- HSBC
- WH Smith
- McDonalds
- Reg Vardy (motors)
- Mountain Warehouse (clothing)
- Primark
- River Island
- Poundland
- Land of Leather
- Costa Coffee
- Au Naturale (household goods)
- Starbucks

5.8 Some of these retailers are already represented in the town and it is not known whether these listed requirements are still current or are for new or extended premises. It appears that there is only limited retailer interest in the town, but it is of a level that one might expect for a town of Oswestry's size and location.

Service Uses

5.9 Oswestry town centre has a reasonable range of non-retail service uses which contribute to the vitality of the town centre. The majority of Oswestry town centre's non-retail service uses are either restaurants/cafes/takeaways or hairdressers/beauty parlours. Banks and financial services are also well represented.

Table 5.3: Oswestry Town Centre Analysis of Selected Service Uses

Type of Use	**Oswestry Town Centre**		**National Average***
	Units	%	%
Restaurants, cafes & takeaways**	27	33	**43**
Banks/financial and other services	18	22	**15**
Estate agents and valuers	8	10	**12**
Travel agents	8	10	**6**
Hairdressers & beauty parlours	20	24	**21**
Laundries and dry cleaners	2	2	**3**
Total	**83**	**100.0*** **	**100.0*** **

Source: Goad
**National average relates to all town centres surveyed by Goad Plans (October 2005)*
***Figure excludes the pub/bars in the centre*
**** Total may not add up to 100 due to rounding*

Commercial Indicators

5.10 The relative performance and importance of town centres can be demonstrated by commercial yields for retail property. Retail yields for the main centres in the sub-region are shown in Table 5.4.

5.11 Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristics to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.

Table 5.4: Retail Yields Oswestry and Other Centres

Centre	Yield %					
	2001	**2002**	**2003**	**2004**	**2005**	**2006**
Telford	5.5	5.5	5.5	5.5	5.5	5.5
Oswestry	9	9	9.5	9.5	9.5	9.5
Shrewsbury	5.5	5.5	5.5	5.5	5.5	6
Ludlow	11	>=10	>=10	9	9	9
Market Drayton	10.5	>=10	>=10	9	9	9
Bridgnorth	11	>=10	>=10	8.5	8.5	8.5
Wrexham	6.75	6.75	6.75	6.75	6.75	6.5
Welshpool	9	9	9	9	9	9

Source: Valuation Office (July 2006)

5.12 Retail yields in Oswestry are currently higher (worse) than the larger centres of Telford, Shrewsbury, Bridgnorth and Wrexham, but on a par with Welshpool, Ludlow and Market Drayton.

Accessibility

5.13 The local road network around Oswestry is relatively good offering connection to the town from a number of settlements and rural hinterlands. Once in the main centre, Oswestry, like most town centres, suffers from a degree of congestion.

5.14 Car Parks are spread around the town. The largest and most heavily used is the Central Car Park which fronts English Walls. All the car parks benefit from good pedestrian links into the shopping core.

5.15 The town is well served by bus routes. However, train access is limited to Gobowen 3 miles north of the town.

5.16 Overall accessibility is good for a town of Oswestry's size.

Summary

5.17 Overall Oswestry town centre displays reasonable signs of vitality and viability for a town of its size. The local population has an acceptable range of shops and services available in accessible locations. The higher than average vacancy rate is of concern especially since the number of vacancies significantly exceeds the published list of retailer requirements in the town.

5.18 The vitality and viability could be said to have declined since 2002 when the Chesterton study concluded that the town centre was very vital and viable. However the main difference is the vacancy rate which Chesterton recorded at the time as being 7.7% of the units.

6.0 QUALITATIVE NEED

Introduction

6.1 This section assesses the qualitative need for retail development in Oswestry Borough and considers the adequacy of existing shopping facilities to meet the current needs of customers.

6.2 The ability of existing facilities to meet the needs and aspirations of each customer group can be examined in a number of ways, for example:

- The quantity (number of outlets and level of floorspace);
- The range of facilities in terms of mix, quality and price; and
- The location and accessibility of shopping facilities.

6.3 Local residents will generally want access to all forms of shopping, although more affluent households may be more selective and may be prepared to travel further for certain types of shopping.

Food and Grocery Shopping

6.4 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a *main* shopping trip made once a week or less often and *top-up* shopping trips made more frequently. Many households will also undertake bulk food shopping trips, particularly households who live in rural areas and who have access to a car for shopping. The availability of a wide range of products and free surface car parking are important requirements for bulk food shopping trips. Superstores (defined as over 2,500 sq m net or more), are the usual destinations for these types of shopping trip. However, in small rural towns, stores of between 1,000 to 2,000 sq m net have a role as bulk food shopping destinations, albeit that they do not offer the same range and choice of products available in larger superstores. The only superstore currently in Oswestry is the Sainsbury's on Black Gate Street. This store is witnessed to be very busy throughout the day.

6.5 There is potential to improve the convenience retailing provision in the borough by increasing the number of supermarkets in areas of deficiency and which are trading significantly above company average turnover.

6.6 Other stores might also benefit from extensions to existing stores which would allow a greater range of produce to be stocked.

Comparison Shopping

6.7 Shopping visitors in Oswestry may expect to find a good range of comparison shops. These shopping facilities will need to be supported by other facilities such as cafes, banks and hairdressers.

6.8 Oswestry has a limited provision of clothing and footwear shops, especially of national multiple retailers. The strong provision of such shops in Wrexham and Shrewsbury is one of the principal factors influencing the amount of leakage out of the Borough.

Retail Warehouses

6.9 There is limited retail warehouse provision in the Borough with only one retail park present (Penda Retail Park, Oswestry). This offers DIY (Focus), carpets (Carpetright) and motor goods and accessories (Halfords).

6.10 There is a qualitative need for extra bulky goods provision in the Borough, particularly electrical appliances.

Local Shops and Services

6.11 There are a number of small shops outside Oswestry, offering an important distribution of local facilities serving the rural communities. These facilities complement the town centre and have an important role in serving the day-to-day needs in their local areas. These shops should be retained to ensure that residents have easy access to local shops and services.

Socio-Economic Characteristics within Oswestry

6.12 Shopping needs may vary considerably, often related to socio-economic characteristics. For example, residents without access to a car or those on low incomes will have different needs to those who are mobile by car or who enjoy higher income. Lower income groups without access to a car may be less able to travel to shopping facilities and may also be socially excluded from high priced shops, therefore, the availability of discount or value retail facilities may be important for these groups. The socio-economic characteristics of Oswestry Borough have been examined and compared with the county and national averages.

6.13 Car ownership in Oswestry (80% of households) is just below the Shropshire county average, but is significantly above the UK average (72.6%), as shown in Table 6.1. A higher proportion of households have two or more cars in Oswestry than the national average, which may be an indication of higher levels of affluence and mobility. However, one would normally expect car ownership levels to be higher in predominantly rural areas such as Shropshire due to the comparative lack of regular public transport.

Table 6.1: Car Ownership 2001

Characteristic	**% Households 2001**		
Car Ownership	**Oswestry**	**Shropshire**	**UK Average**
Two or more	34.0	38.0	28.8
One	46.0	44.3	43.8
None	20.0	17.7	27.4

Sources: 2001 Census of Population

6.14 Oswestry has a high proportion of economically active adults in employment as shown in Table 6.2, compared with the national average, but also a higher proportion of retired adults. The unemployment rate is lower than the national average but slightly higher than the county average.

Table 6.2: Economic Activity 2001

Status	**% People aged 16-74**		
	Oswestry	**Shropshire**	**UK Average**
Employed	63.0	64.3	59.6
Unemployed	3.2	2.5	4.4
Looking after home/family	5.7	6.0	6.4
Students	5.8	5.1	7.2
Retired	14.8	15.3	13.4
Other inactive	7.4	6.9	8.9

Sources: 2001 Census of Population

6.15 Average gross weekly earnings in Oswestry (Full Time Employment) are lower than the Shropshire and regional average as shown in Table 6.3. This will limit the spending power of households although the average annual spend on retail goods in

Oswestry of £4,409 per person is slightly higher than the national average of £4,386, and therefore is not of a particular concern.

Table 6.3 Average Wages

	Oswestry Borough	Shropshire	West Midlands
Average gross weekly earnings in full time employment (2005*)			
• Male	£419.90	£431.40	£440.80
• Female	£336.70	£360.80	£345.50
• All	£384.30	£407.10	£444.10
*by place of residence			

Source: Oswestry Borough Annual Monitoring Report 2005/06

6.16 The age structure in Oswestry varies slightly from the National average, with fewer young adults, and conversely more people of retirement age.

Table 6.4: Age Structure 2001

Status	% of Population 2001		
	Oswestry	Shropshire	UK Average
Children 0-14	18.7	17.8	18.9
Adults 15 to 29	16.8	16.3	18.8
Adults 30 to 44	21.6	21.2	22.6
Adults 45 to 59	19.8	20.9	19.0
Adults 60 to 74	14.5	15.3	13.0
Adults 75 +	8.5	8.5	7.4

Sources: 2001 Census of Population

6.17 This socio-economic analysis indicates there are differences between the profile of residents in Oswestry, Shropshire and the UK as a whole. Oswestry, in line with the remainder of Shropshire, has higher levels of car ownership than the national average and lower unemployment. The Borough has a high proportion of middle aged adults and retired adults. These characteristics suggest that many households in Oswestry are relatively mobile and will have the ability to travel for shopping purposes, although average gross weekly earnings (and therefore disposable income) are lower than the County and Regional averages.

7.0 QUANTITATIVE SCOPE FOR RETAIL DEVELOPMENT

Introduction

7.1 This section assesses the quantitative scope for new retail floorspace in Oswestry in the period 2006 – 2021. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

7.2 Projections have been made to 2021 in line with the LDF timeframe. A number of assumptions are required to project this far in advance and the later projections are therefore more susceptible to increasing margins of error, such that monitoring of expenditure trends will be necessary to assess changes in available expenditure in the future.

7.3 All monetary values expressed in this analysis are at 2004 prices unless stated otherwise.

Methodology and Data

7.4 The quantitative analysis is based on a study area defined for the Borough and the surrounding catchment area which has been divided into 8 zones for more detailed analysis.

7.5 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Shrewsbury and Wrexham. Shopping facilities in Oswestry are expected to attract the majority of their trade from residents within the study area. There will, however, be some degree of inflow. We have assumed an inflow rate of 5% for both convenience and comparison goods.

7.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area populations. Experian's local consumer expenditure estimates for comparison and convenience goods for each zone in the study area have been obtained.

7.7 Experian's latest national expenditure projections have been used to forecast expenditure within the study area. Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

Convenience Goods Forecasts

7.8 Experian provides recommended expenditure growth rates for the period 2003 to 2008, and 2003 to 2013. The recommended growth rate for the period 2003 and 2008 is 0.6% per annum for convenience goods. This growth rate is used to forecast expenditure per capita up to 2008. A trend line adjusted growth rate of 1.2% per annum for convenience goods has been adopted to project expenditure between 2008 and 2013, consistent with Experian's overall growth forecasts for 2003 to 2013 and the use of their 2003 to 2008 forecast for this initial period. Growth in expenditure beyond 2013 is based on 0.9% per annum for convenience goods, in line with Experian's growth forecast for 2003 to 2013.

Comparison Goods Forecasts

7.9 Experian provides recommended expenditure growth rates for the period 2004 to 2009, and 2004 to 2014. The recommended growth rate for the period 2004 and 2009 is 3.9% per annum for comparison goods. This growth rate is used to forecast expenditure per capita up to 2009. A trend line adjusted growth rate of 3.3% per annum for comparison goods has been adopted to project expenditure between 2009 and 2014, consistent with Experian's overall growth forecasts for 2004 to 2014 and the use of their 2004 to 2009 forecast for this initial period. Growth in expenditure beyond 2014 is based on 3.6% per annum for comparison goods, in line with Experian's growth forecast for 2004 to 2014.

7.10 To assess the capacity for new retail floorspace, penetration rates are estimated for both convenience and comparison shopping facilities within the study area. The assessment of penetration rates are based primarily on the household survey results undertaken as part of this study. The penetration rates take account of survey responses for main food shopping trips, top-up shopping trips and other stores used for main food shopping as well as a range of different classes of comparison goods.

7.11 The total turnover of shops within the study area is based on penetration rates and the level of available expenditure in the study area for comparison and convenience goods. These turnover estimates are converted into average turnover to sales floorspace density. Turnover densities are compared with company average turnover to sales floorspace densities and benchmark turnover levels in order to identify potential surplus capacity for convenience goods. The turnover estimates for comparison goods are used as a base point from which future growth in expenditure is assessed.

Population and Spending

7.12 The study area population for 2001 to 2021 is set out in Table 1B in Appendix B, based on the 2001 Census, 2005 mid-year population estimates and 2003 based sub-national population projections. Table 2B in Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area.

7.13 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as internet sales, street markets and vending machines.

7.14 As a consequence of the forecast growth in per capita spending, convenience and comparison goods spending within the study area is forecast to increase in the short, medium and long term as shown in Tables 3B and 2C in the appendices. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

7.15 Existing convenience goods retail sales floorspace within Oswestry town centre is 6,755 sq m net as set out in Table 1A, Appendix A. The total consists of a Sainsburys, Somerfield, Aldi, Kwik Save, Iceland and other town centre convenience stores. This floorspace figure excludes comparison sales floorspace within food stores (estimated to be currently 958 sq m net), and other convenience stores in the study area.

7.16 Comparison goods retail floorspace within Oswestry including retail warehouses is set out in Table 3A, Appendix A. Total identified comparison sales floorspace in Oswestry is estimated to be 29,413 sq m net, including the allowance for comparison sales floorspace within food stores (958 sq m net).

7.17 This is based on first applying a net to gross ratio of 70% to the 28,240 sq m identified as town centre comparison goods floorspace by Goad. In addition, a new Wilkinsons store has been constructed at the former Top Ten Bingo site on New Street, providing a further 1,775 sq m of net comparison retail space. The Penda Retail Park provides a further 4,328 sq m net of retail warehouse floorspace, Colour Supplies 1,785 sq m of DIY floorspace and McLaren Furniture is estimated to provide a further 800 sq m net of comparison goods floorspace.

Existing and Future Convenience Spending Patterns

7.18 The results of the NEMS household shopper survey undertaken in August 2006, have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration for each study area zone are shown in Table 4B, Appendix B.

7.19 The total level of convenience goods expenditure available at 2006 within each zone varies from £7.53 million in Zone 7 to £24.87 million in Zone 2 (as shown in Table 5B, Appendix B).

7.20 Convenience expenditure retention is currently highest in Zone 5, with approximately 88% of available expenditure being spent in Oswestry town centre. This is a relatively high level of retention, reflecting the range of supermarkets available in the town centre. In addition, there is significant draw from Zones 3, 4, 6 and 8 to Oswestry town centre.

7.21 Wrexham and Shrewsbury all attract significant levels of expenditure from neighbouring zones. Wrexham attracts 75% of convenience expenditure from Zone 1 and 46% from Zone 2. Shrewsbury attracts 71% of the expenditure from Zone 7, and Welshpool attracts 23% of expenditure from Zone 8 (as shown in Table 4B, Appendix B).

7.22 Company average turnover to sales floorspace densities are available for major food store operators and these densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the convenience sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated.

7.23 This benchmark turnover is not necessarily the actual turnover of the food store but does provide a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

7.24 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed that small shops within Oswestry will have an average sales density of £4,000 per sq m (£372 per sq ft).

7.25 The total convenience goods benchmark turnover of all identified food stores/convenience shops in Oswestry town centre at 2006 is £40.64 million.

7.26 The estimates of available expenditure within Oswestry town centre are summarised and compared with the benchmark turnover in Table 9B. Our assessment suggests that total convenience goods expenditure spent in Oswestry in 2006 is £61.11 million. Compared to a total average benchmark turnover of £40.64 million. Therefore, on average, convenience sales floorspace in the town centre is shown to be trading significantly above (by about 50%) the company average benchmark turnover.

7.27 There are differences in the capacity levels across the different stores within the town however. There is significant surplus capacity in Sainsbury's, and some in Somerfield and Aldi, but limited to none in Iceland, Kwik Save and other town centre shops.

7.28 On the basis of existing market shares, projections in expenditure and population growth have been used to estimate available convenience goods expenditure in 2011, 2016 and 2021, as shown in Tables 6B, 7B and 8B of Appendix B and summarised in Table 9B

Existing and Future Comparison Goods Spending Patterns

7.29 The results of the NEMS household shopper survey undertaken in August 2006, have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration for each study area zone are shown in Table 3C, Appendix C.

7.30 The level of comparison goods expenditure available at 2006 within each zone varies from £14.51 million in Zone 7 to £46.86 million in Zone 5 (as shown by Table 2C, Appendix C).

7.31 Oswestry town centre attracts around 33% of comparison goods expenditure in the study area, and attracts the highest levels of market share from Zones 3, 4, 5, 6 and 8 (shown by Table 3C, Appendix C).

7.32 Most of the leakage from Oswestry town centre goes to Wrexham and Shrewsbury. Wrexham attracts the majority of expenditure from Zones 1, 2 and 4, and Shrewsbury attracts the most comparison goods expenditure from Zone 7 (shown by Table 3C, Appendix C).

7.33 Average sales densities are not widely available for comparison shops. Based on our experience across the country average sales densities for high street comparison shops can vary significantly, and can typically range from between £2,153 and £7,535 per sq m net (£200 to 700 per sq ft). The higher end of this range is usually only achieved by large successful shopping centres, which reflects the higher proportion of quality multiple retailers and modern shopping facilities. We would normally expect comparison shops in a medium to small town centre such as Oswestry to have an average sales density of about £3,000 to £4,000 per sq m net.

7.34 The average sales density for retail warehouse operators is generally much lower than for high street comparison shops, usually ranging from between £1,076 and £2,691 per sq m net. Carpetright and Focus DIY have turnover densities at the bottom end of this range.

7.35 Actual average trading densities within Oswestry have been calculated based on existing 2006 trading patterns shown in Table 3C, Appendix C, divided by the amount of sales floorspace shown in Table 4A, Appendix A.

7.36 Our analysis of existing shopping patterns (summarised in Table 7.1 below) suggests that all comparison sales floorspace in Oswestry (town centre and retail warehouse floorspace) is trading at £2,588 per sq m net. This average sales density is relatively low, but reflects the high proportional amount of sales floorspace provided in the Carpetright, Focus DIY, Colour Supplies and McLaren Furniture stores (6,912 sq m net), which will have a low average sales density. Nevertheless, these figures do not suggest that existing comparison sales floorspace was over-trading in 2006, and there is potential for existing floorspace to increase its turnover density in the future.

Table 7.1: Comparison Trading Levels in 2006

Centres/Facilities	**Available Expenditure £M**	**Net Sales Floorspace Sq M**	**Average Turnover £ Per Sq M Net**
Oswestry	**£76.12**	**29,413**	**£2,588**

Source: Tables 2A and 3C
** includes an allowance for comparison goods sales floorspace in food stores.*

Future Spending Growth

7.37 On the basis of existing market shares, projections in expenditure and population growth have been used to estimate available comparison goods expenditure in 2011, 2016 and 2021 as shown in Tables 5C, 6C and 7C of Appendix C and summarised in Table 8C.

7.38 As can be seen in Table 8C, there is projected to be a surplus capacity of £10.34 million of expenditure in Oswestry by 2011, rising to £23.26 million by 2016 and £41.28 million at 2021.

8.0 RECOMMENDATIONS

8.1 This report provides a Borough wide needs assessment taking into account the results of the household survey. It provides a guide to the shopping needs of Oswestry in the period from 2006 to 2021. The principal conclusions of the capacity analysis contained within this study are summarised below.

Quantitative Capacity for Additional Convenience Floorspace

8.2 The forecast convenience goods surplus expenditure projections for the Borough have been converted into net sales floorspace projections in Table 8.1 below based on a benchmark turnover density of £11,500 per sq m at 2006. These figures assume that all surplus convenience expenditure will be accommodated within large food superstores rather than small convenience outlets. This turnover density figure represents a realistic mid-point of the company averages of the four main food operators – Tesco, Asda, Morrisons and Sainsbury, who, with the exception of Sainsbury, currently have no representation in Oswestry and may therefore be the most likely occupiers of new purpose built floorspace.

8.3 An annual increase in turnover density efficiency of 0.3% has been allowed for existing and new convenience floorspace.

8.4 The floorspace capacity relates to convenience goods sales floorspace. We have provided an indicative example of how this need could manifest as a supermarket proposal, taking into account comparison goods floorspace and non-sales floorspace. Whilst the typical proportion of the retail sales floorspace dedicated to convenience goods in a large supermarket can range from as little as 55% up to 90% we have allowed for 80% in the example below. It will be for the local authority to assess individual applications for supermarkets on their own merits, and the need and impact of any comparison goods floorspace. The amount of back-up space required for storage and ancillary staff areas will vary from operator to operator and size of store. The net sales floorspace typically occupies 55 – 75 % of the total floorspace of a large modern foodstore. We have assumed a net sales floorspace of 65% in the example below.

Table 8.1 Projected Convenience Floorspace Requirement

	2006	2011	2016	2021
Surplus expenditure (£M)	£20.47	£25.22	£29.64	£33.43
Turnover Density £ per sq m	£11,500	£11,674	£11,850	£12,029
Net conv floorspace requirement sq m	**1,780**	**2,160**	**2,501**	**2,779**
20% comparison goods	445	540	625	695
Total Net sq m	2,225	2,701	3,127	3,474
Total Supermarket Gross sq m	3,423	4,155	4,810	5,345

8.5 These projected floorspace figures should be regarded as broad guidance only for planning purposes, limited by further considerations of qualitative requirements – how new floorspace might complement and reinforce the existing centre rather than compete – and the consequential impact(s) on existing stores and other centres.

8.6 The figures suggest that within Oswestry there is capacity for a new supermarket. Some of this need could be accommodated in an extension to the existing Sainsbury's store which is displaying both quantitative and qualitative evidence of overtrading, however, there are land constraints which would make this prospect unlikely in the short to medium term.

8.7 These figures are based on existing market shares. If proposals for new floorspace were to come forward which were considered to be of sufficient size and quality to alter market shares by reducing leakage outside of the Borough, there could be further scope for additional floorspace, over and above the projections shown above. However, the potential for proposed food store developments to achieve this claw back of expenditure leakage without harming existing facilities within the Borough will need to be assessed on a case by case basis.

Quantitative Capacity for Additional Comparison Floorspace

8.8 Future available comparison expenditure is compared with the turnover of existing comparison retail facilities within the Borough, in order to provide estimates of surplus expenditure, as summarised in Table 8C, Appendix C.

8.9 The forecast comparison goods surplus expenditure projections for the Borough have been converted into net sales floorspace projections in Table 8.2 based on an average turnover density of £3,500 per sq m net at 2006, inflated by 1.5% per annum up to 2011, 2016 and 2021. This is an appropriate average sales density for new comparison floorspace and takes into account increases in turnover efficiency and the higher turnover density that would be anticipated in modern purpose built floorspace.

8.10 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. An allowance has therefore been made for existing comparison floorspace to increase its turnover by 1.5% per annum, as well as the benchmark turnover used to convert to floorspace capacity.

8.11 The sequential approach suggests that town centre sites should be the first choice for all types of retail development. However, it may not be possible to accommodate all types of development in Oswestry town centre. The sale of bulky goods may require large showrooms and pick-up and delivery facilities which may be difficult to accommodate within town centres. Applications for large edge or out of centre development should be considered on a case by case basis, with particular regard given to the likely turnover density of the store in the context of overall capacity as identified below.

8.12 The long term projections beyond 2016 should be treated with caution and will need to be reassessed during the plan period. PPS6 requires local authorities to identify sufficient sites to accommodate identified need for the first 5 years from adoption of the local development plan, therefore we recommend that the Council seek to meet the identified need to 2016.

8.13 For the comparison goods projections we have assumed that net sales floorspace will account for 70% of the total gross floorspace of new development.

8.14 The figures suggest that within Oswestry there is capacity for a reasonable amount of new comparison goods floorspace. However, given that there is an above average amount of vacant floorspace in the town, it would be prudent to allow for some of this vacant space to accommodate some of the growth in expenditure.

8.15 Goad identify a vacancy rate in the town of 14% and covering approximately 2,880 sq m gross of retail floorspace. All towns will have some degree of vacancy at any one time. If around 1,000 sq m of this space were to be reoccupied, this would reduce vacancy rates to a more healthy 9%.

8.16 Table 8.2 below identifies that in addition to the comparison goods floorspace that might be included in a new supermarket (see Table 8.1 above) and a reduction in vacant floorspace by around 1,000 sq m, growth in expenditure could still support a reasonably large town centre development by 2016 (i.e. approximately 5,860 sq m gross), which could provide about 29 new town centre shop units, based on an average unit size of about 200 sq m gross.

Table 8.2 Comparison Goods Capacity for Oswestry 2006 – 2021

	2006	2011	2016	2021
Comparison Goods Surplus £M	n/a	£10.34	£23.26	£41.28
Average Turnover Density £ per sq m	£3,500	£3,770	£4,062	£4,376
Comparison Goods Net Requirement sq m	n/a	2,743	5,727	9,433
Less New Supermarket Comparson Goods Provision	n/a	2,203	5,102	8,738
Less reoccupation of vacant floorspace	n/a	1,203	4,102	7,738
Gross floorspace requirement	n/a	1,718	5,860	11,054

The Strategy for Oswestry

8.17 Oswestry is the main shopping centre in the study area. Its main competition to further expansion comes predominantly from Wrexham and Shrewsbury.

8.18 The convenience goods expenditure retention within the study area as a whole is 43%, with a further 7% retention in convenience stores outside the town centre including Stans Supermarket at St Martins. Within the 'core' catchment area of zones 3, 4, 5 and 6 convenience goods retention is 67% for Oswestry town centre, and a further 10% in local centres. There remains scope to reduce leakage, primarily at the expense of Wrexham and Shrewsbury.

8.19 Comparison goods expenditure retention in the study area is significantly lower at 33%, with most leakage attracted to Wrexham, Shrewsbury and Chester. In the 'core' zones of 3, 4, 5 6 and 8, retention is 56%. Whilst there is theoretical scope to reduce leakage to larger centres and increase market share, this would only be achieved if a step change in the amount and quality of retail floorspace was introduced.

8.20 In terms of comparison goods retailing we recommend that Oswestry pursues a strategy of maintaining its current position in the regional retail hierarchy, by developing to cater for growth in available expenditure alone, rather than targeting additional claw back of expenditure leakage.

Accommodating Future Growth

Implications of Not Securing New Retail Development

8.21 Existing vacant floorspace in the Borough is insufficient to meet all the projected floorspace requirements. If the Council fails to secure additional retail development in the future one or a combination of the following will occur:

i) the proportional level of expenditure leakage from Oswestry to other competing towns outside the Borough will increase, resulting in an increase in the number and average length of car borne shopping trips; and/or

ii) existing retail floorspace within Oswestry will trade above existing levels and there may be congestion in some shops/stores during peak periods, which may in turn encourage residents to shop outside the Borough.

iii) If insufficient opportunities to provide additional floorspace within Oswestry town and edge of centre are identified then there is likely to be pressure for further retail development within out-of-centre locations, which would do little to maintain or enhance the vitality and viability of the town centre. National guidance indicates that local authorities should plan for an adequate and continuous supply of land, and that the quantitative need for retail development is a key consideration.

8.22 For these reasons, the Council should seek to identify opportunities for comparison and convenience retail development.

Potential Development Opportunities

8.23 The future expansion of Oswestry town centre is generally constrained to the east by the railway line, to the north by the Castle Mound and in general by existing residential development.

8.24 There are small pockets of potential development land throughout the centre (land assembly permitting) and a number of sites that have been put forward at the LDF Issues and Options consultation stage.

8.25 A review of potential retail development sites has been undertaken and included in Appendix D. These sites have been evaluated in terms of their implications for the scope and need for additional retail facilities in Oswestry, and have been assessed against the following factors:

iv) existing land uses and availability, categorised as follows:

- short term - potential to be completed by 2011;
- medium term - likely to be completed between 2011 and 2016;
- long term - likely to be completed after 2016;

v) commercial potential for retail development and the most likely form of development, categorised as follows:

- prime site - likely to attract a developer and occupiers;
- off-prime site - could attract specific forms of retail use; and
- secondary site - may generate limited demand.

vi) potential scope to accommodate additional retail floorspace (net increase), categorised as follows:

- small scale - under 1,000 sq m gross floorspace;
- medium scale – 1,000 to 2,500 sq m gross floorspace;
- large scale - over 2,500 sq m gross floorspace;

vii) potential development constraints; and

viii) possible alternative uses.

8.26 The overall potential of each opportunity, taking account of all of the factors listed above, has been categorised as follows:

ix) *Good* - development sites that have good prospects for providing additional retail floorspace, and should be considered for implementation in the short to medium term;

x) *Reasonable* - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and

xi) *Poor* - development sites that may be unattractive or unsuitable for retail development where their delivery is very uncertain.

8.27 The evaluation undertaken for each opportunity is not a detailed planning appraisal and does not imply that planning permission should be granted or refused for retail development. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the Council in the preparation of the Site Allocations DPD.

Conclusion of Site Evaluations

8.28 The quantitative need assessment suggests that there is need for a new supermarket in the town. We consider this to be the priority for identifying a site of sufficient size that could accommodate a new store. As such, we recommend two preferred options. The Central Car Park site is the most sequentially preferable site that would be suitable, available and viable. However, further study would be required to ascertain the implications of any loss of car parking on the vitality and viability of the town centre before this site should be allocated.

8.29 If it is found that car parking or other issues would make the allocation of the Central Car Park site unsuitable, there are two further sites which have equal standing in terms of suitability and likely availability – The Richard Burbidge site and the JT Hughes Guttercrest site. Both sites would require relocation of existing employment premises and both are relatively close to existing supermarket provision. In distinguishing between which site would be the preferred location for a new supermarket, we would recommend that consideration should be given to the traffic impact and access arrangements into both sites, given that both sites are located near busy junctions and residential streets.

8.30 For comparison goods floorspace, there are a number of town centre opportunities. The best potential lies with redevelopment of the Market Hall and Horsemarket. The adjoining garage could be added to the development parcel to increase the potential of the site. Again, the issue of loss of car parking should be investigated before any LDF allocation is made.

8.31 If the Central Car Park site was found to be available for redevelopment, some comparison goods units could be accommodated alongside a supermarket.

8.32 In order to meet the identified need to 2016, some out of centre allocations may be required, however, these should be appropriately phased so as not to prejudice town centre redevelopment.

8.33 If the Richard Burbidge Factory site is allocated for supermarket use, then further comparison goods development at the Former Cambrian works building would best link with other retail development in the north of the town centre. Alternatively the JT Hughes site has the potential to link with redevelopment of the medical centre/adult training centre. The Arriva Bus depot would also form a natural extension of the

Penda Retail Park on Salop Road for large format floorspace and would link with potential redevelopment at JT Hughes.

Planning Policy Review

Defining Centre Boundaries and Retail Frontages

8.34 PPS6 indicates that local authorities should define the boundary of town centres. It states that for purposes of this policy statement, the "centre" for a retail development constitutes the primary shopping area. For all other main town centre uses the "centre" should be regarded as the area embraced by the town centre boundary. The extent of the town centre should be defined on the proposals map.

8.35 PPS6 states that the Primary Shopping Area (PSA) should be the defined area where retail development is concentrated (generally comprising the primary frontages and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Primary frontages are likely to include a high proportion of retail uses. Secondary frontages provide greater opportunities for a diversity of uses.

8.36 A plan indicating a recommended PSA, primary and secondary shopping frontages is contained in Appendix E. Some amendments have been made to the current primary shopping frontages to more closely reflect the definitions in PPS6 and the current retail provision.

LDF Policies

8.37 The new Local Development Framework has introduced a 'suite' of different development plan documents, and as such, the retail policies of the adopted local plan may need to be reorganised.

8.38 The retail strategy for Oswestry should be contained in the Core Strategy DPD, retail allocations in the Site Allocations DPD and development control policies on changes of use etc in the Development Control DPD.

8.39 Policy SP1 of the Local Plan deals with the location of new retail development. This policy is consistent with government guidance and could be carried forward in the Core Strategy, with an amendment to reflect the designation of the Primary Shopping Area rather than the existing Retail Development Area.

8.40 Policy SP2 deals with applications for food store development. It is a criteria based policy which broadly reflects the tests set out in PPS6. The policy does not allocate sites for food store development and refers to a retail development strategy. However, it is unclear what the Council's development strategy is in relation to food store development. The policy does not indicate whether there is a need for new development and where this need will be accommodated. In addition we believe the wording of the policy is complicated and overly long, and is unnecessary because it repeats PPS6 policy. PPS6 makes it clear that local authorities should identify sufficient sites to accommodate the retail need arising in the first five years following adoption of the plan. We therefore recommend that a specific food store allocation be made in the Site Allocations DPD. This policy could then be simplified to require that applications for food store development outside of the PSA will only be allowed where they conform with government guidance and where they would not prejudice the development of allocated sites.

8.41 Policy SP3 controls comparison shopping development. Our recommendations relating to Policy SP2 also apply to Policy SP3.

8.42 Policies SP4 and SP5 deal with changes of use and non retail services within the town centre. These policies should be included in the Development Control DPD. Whilst Policy SP4 seeks to prevent the loss of Class A1 use at ground floor level within the Primary Shopping Frontages. Policy SP5 allows greater flexibility in Secondary Frontage areas.

8.43 Based on our experience, a range of approaches have been adopted by local authorities to control changes of use and the predominance of retail uses within town centres across the country, and in broad terms the approaches can be summarised as follows:

- a ban on changes of use within tightly defined primary shopping frontages and a more flexible approach within secondary frontages;
- a maximum limit on non-retail use at ground floor level (or a minimum level of retail use) in terms of the proportion of units or length of frontage either within primary and secondary frontages or across the centre as a whole;
- as above but within sections of the frontages (i.e. separate parades);
- a criteria based policy usually relating to the retention of active frontages, amenity issues and impact on the centre's vitality and viability; and

- the prevention of adjoining or a concentration of non-retail uses at ground floor level.

8.44 In some cases a combination of the above has been adopted, as well as different approaches within different centres in the same authority.

8.45 It is clear that there is no standard approach or best practice approach that can be applied to all centres. The existing policies broadly adopt the first approach listed above. If the policies have proved successful in development control decisions and at appeal then we can see no reason to alter these policies. The retail capacity projections in this study demonstrate that it is necessary to safeguard existing Class A1 retail floorspace in order to ensure Oswestry maintains its current position within the retail hierarchy. Therefore frontage policies should be maintained.

Future Strategy Implementation and Monitoring

8.46 We would recommend that this retail capacity study should be updated in 4 – 5 years' time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Mintel's Retail Ranking); and
- implemented development within and around the study area.

8.47 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may nevertheless be necessary to undertake an updated household survey to address the implementation of major developments that will have significantly altered shopping patterns in the Borough.

Appendix A

Study Area and Existing Retail Facilities

STUDY AREA CATCHMENT ZONES – POST CODE AREAS

Zone	Description	Post Code Areas
1	Overton/Ruabon	LL13 0, LL14 6
2	Cefn Mawr/Pontfadog	LL14 3, LL14 5, LL20 7
3	Gobowen	SY10 7, SY10 9
4	St Martins/Ellesmere	SY11 3, SY12 0, SY12 9
5	Oswestry Town Centre	SY11 1, SY11 2
6	Wittington/West Felton	SY10 8, SY11 4
7	Baschurch	SY4 1, SY4 2
8	Pant/Llanfyllin	SY22 5, SY22 6

Table 1A - Convenience Floorspace and Benchmark Turnover (2004 prices)

	Net Sales Floorspace Sq M	% Convenience Sales Floorspace	Convenience Sales Floorspace Sq M Net	Turnover Sales Floorspace Density £ per Sq M	Total Convenience Turnover £M
Oswestry					
Sainsbury Oswestry	2,620	80%	2,096	£9,335	£19.57
Somerfield, Oswestry	1,438	90%	1,294	£5,715	£7.40
Kwik Save, Oswestry	827	90%	744	£3,618	£2.69
Iceland,Oswestry	615	98%	603	£4,914	£2.96
Aldi	650	70%	455	£3,891	£1.77
Other Oswestry local shops	1,563	100%	1,563	£4,000	£6.25
Total	**7,713**		**6,755**	**£6,016**	**£40.64**
	Comparison Sales Floorspace in Food Stores Sq M Net				**958**

Table 2A - Comparison Floorspace and Benchmark Turnover (2004 prices)

	Gross Floorspace Sq M	**Net Sales Floorspace Sq M**
Oswestry Town Centre (1)	28,240	19,768
New Wilkinsons		1,775
Halfords, Penda Retail Park	835	585
Carpetright, Penda Retail Park	697	558
Focus DIY, Penda Retail Park	3,539	3,185
McLaren Furniture		800
Colour Supplies		1,785
Comparison floorspace in food stores		958
GRAND TOTAL	**33,311**	**29,413**

(1) excludes indoor and outdoor market,

Appendix B

Convenience Retail Assessment

Table 1B : Population Projections

Catchment Area	2001	2006	2011	2016	2021
Zone 1 Overton/Ruabon	10,597	10,986	11,327	11,583	11,867
Zone 2 Cefn Mawr/Pontfadog	16,232	16,829	17,350	17,742	18,177
Zone 3 Gobowen	8,441	8,751	9,023	9,226	9,452
Zone 4 St Martins/Ellesmere	12,629	13,093	13,499	13,804	14,142
Zone 5 Oswestry Town Centre	15,383	15,948	16,443	16,814	17,226
Zone 6 Wittington/West Felton	7,448	7,722	7,961	8,141	8,340
Zone 7 Baschurch	5,115	5,303	5,467	5,591	5,728
Zone 8 Pant/Llanfyllin	8,532	8,846	9,120	9,326	9,554
	84,377	**87,478**	**90,191**	**92,225**	**94,486**

Sources: *Experian 2001 Census Population*
ONS 2003 based projections

Table 2B: Convenience Goods Expenditure Per Capita (2004 Prices)

Expenditure Per Capita	2006	2011	2016	2021	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021
Zone 1	£1,515	£1,599	£1,682	£1,744	5.5%	11.0%	9.1%
Zone 2	£1,478	£1,560	£1,641	£1,701	5.5%	11.0%	9.0%
Zone 3	£1,638	£1,728	£1,818	£1,884	5.5%	11.0%	9.0%
Zone 4	£1,489	£1,572	£1,653	£1,714	5.6%	11.0%	9.0%
Zone 5	£1,549	£1,634	£1,719	£1,782	5.5%	11.0%	9.1%
Zone 6	£1,624	£1,713	£1,803	£1,868	5.5%	11.0%	9.0%
Zone 7	£1,420	£1,499	£1,577	£1,634	5.6%	11.1%	9.0%
Zone 8	£1,519	£1,603	£1,687	£1,748	5.5%	11.1%	9.0%

Sources:
Experian local estimates of convenience goods expenditure per capita
Excluding special forms of trading 0.9%
Experian Business Strategies - recommended forecast growth rates
(0.6% per annum between 2003 to 2008, 1.2% between 2008 and 2013 and 0.9% per annum between 2013 and 2021)

Table 3B: Total Available Convenience Goods Expenditure (£M - 2004 Prices)

Catchment Area	2006	2011	2016	2021	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021
Zone 1	£16.64	£18.11	£19.48	£20.70	8.8%	17.0%	24.3%
Zone 2	£24.87	£27.07	£29.11	£30.92	8.8%	17.1%	24.3%
Zone 3	£14.33	£15.59	£16.77	£17.81	8.8%	17.0%	24.2%
Zone 4	£19.50	£21.22	£22.82	£24.24	8.8%	17.0%	24.3%
Zone 5	£24.70	£26.87	£28.90	£30.70	8.8%	17.0%	24.3%
Zone 6	£12.54	£13.64	£14.68	£15.58	8.8%	17.0%	24.2%
Zone 7	£7.53	£8.20	£8.82	£9.36	8.8%	17.1%	24.3%
Zone 8	£13.44	£14.62	£15.73	£16.70	8.8%	17.1%	24.3%
Total	**£133.56**	**£145.31**	**£156.32**	**£166.00**	**8.8%**	**17.0%**	**24.3%**

Sources: *Table 1B and Table 2B*

Table 4B: **Existing Convenience Shopping Penetration Rates 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Sainsbury Oswestry	1%	6%	38%	16%	40%	43%	5%	24%	5%
Somerfield, Oswestry	1%	2%	16%	5%	20%	18%	1%	7%	5%
Iceland,Oswestry	1%	1%	1%	0%	2%	2%	0%	3%	5%
Kwik Save, Oswestry	0%	1%	4%	1%	5%	2%	0%	3%	5%
Aldi, Oswestry	1%	2%	7%	6%	8%	10%	3%	7%	5%
Other town centre shops	1%	0%	3%	1%	13%	6%	1%	1%	5%
Oswestry Sub-Total	5%	12%	69%	29%	88%	81%	10%	45%	5%
Stans Supermarket, St Martins	2%	6%	8%	22%	1%	1%	0%	1%	n/a
Local Shops Pant	0%	0%	2%	0%	0%	2%	0%	1%	n/a
Local shops Gobowen	0%	0%	2%	2%	0%	1%	0%	0%	n/a
Other study area	10%	23%	3%	15%	0%	3%	9%	20%	n/a
Wrexham	75%	46%	8%	13%	6%	3%	0%	1%	n/a
Shrewsbury	0%	1%	5%	14%	4%	7%	71%	8%	n/a
Welshpool	0%	0%	1%	0%	1%	1%	0%	23%	n/a
Other outflow	8%	12%	2%	5%	0%	1%	10%	1%	n/a
Market Share Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**

Table 5B: **Convenience Expenditure 2006 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend
Expenditure 2006	**£16.64**	**£24.87**	**£14.33**	**£19.50**	**£24.70**	**£12.54**	**£7.53**	**£13.44**	**n/a**	
Sainsbury Oswestry	£0.17	£1.49	£5.45	£3.12	£9.88	£5.39	£0.38	£3.22	£1.53	£30.63
Somerfield, Oswestry	£0.17	£0.50	£2.29	£0.97	£4.94	£2.26	£0.08	£0.94	£0.64	£12.79
Iceland,Oswestry	£0.17	£0.25	£0.14	£0.00	£0.49	£0.25	£0.00	£0.40	£0.09	£1.80
Kwik Save, Oswestry	£0.00	£0.25	£0.57	£0.19	£1.24	£0.25	£0.00	£0.40	£0.15	£3.06
Aldi, Oswestry	£0.17	£0.50	£1.00	£1.17	£1.98	£1.25	£0.23	£0.94	£0.38	£7.61
Other town centre shops	£0.17	£0.00	£0.43	£0.19	£3.21	£0.75	£0.08	£0.13	£0.26	£5.23
Oswestry Sub-Total	£0.83	£2.98	£9.89	£5.65	£21.74	£10.16	£0.75	£6.05	£3.06	£61.11
Stans Supermarket, St Martins	£0.33	£1.49	£1.15	£4.29	£0.25	£0.13	£0.00	£0.13	£0.00	£7.77
Local Shops Pant	£0.00	£0.00	£0.29	£0.00	£0.00	£0.25	£0.00	£0.13	£0.00	£0.67
Local shops Gobowen	£0.00	£0.00	£0.29	£0.39	£0.00	£0.13	£0.00	£0.00	£0.00	£0.80
Other study area	£1.66	£5.72	£0.43	£2.92	£0.00	£0.38	£0.68	£2.69	£0.00	£14.48
Wrexham	£12.48	£11.44	£1.15	£2.53	£1.48	£0.38	£0.00	£0.13	£0.00	£29.60
Shrewsbury	£0.00	£0.25	£0.72	£2.73	£0.99	£0.88	£5.35	£1.07	£0.00	£11.98
Welshpool	£0.00	£0.00	£0.14	£0.00	£0.25	£0.13	£0.00	£3.09	£0.00	£3.61
Other outflow	£1.33	£2.98	£0.29	£0.97	£0.00	£0.13	£0.75	£0.13	£0.00	£6.59
Total	***£16.64***	***£24.87***	***£14.33***	***£19.50***	***£24.70***	***£12.54***	***£7.53***	***£13.44***	***£3.06***	***£136.61***

Table 6B: **Convenience Expenditure 2011 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend
Expenditure 2011	**£18.11**	**£27.07**	**£15.59**	**£21.22**	**£26.87**	**£13.64**	**£8.20**	**£14.62**	**n/a**	
Sainsbury Oswestry	£0.18	£1.62	£5.92	£3.40	£10.75	£5.86	£0.41	£3.51	£1.67	£33.32
Somerfield, Oswestry	£0.18	£0.54	£2.49	£1.06	£5.37	£2.45	£0.08	£1.02	£0.70	£13.91
Iceland,Oswestry	£0.18	£0.27	£0.16	£0.00	£0.54	£0.27	£0.00	£0.44	£0.10	£1.95
Kwik Save, Oswestry	£0.00	£0.27	£0.62	£0.21	£1.34	£0.27	£0.00	£0.44	£0.17	£3.33
Aldi, Oswestry	£0.18	£0.54	£1.09	£1.27	£2.15	£1.36	£0.25	£1.02	£0.41	£8.28
Other town centre shops	£0.18	£0.00	£0.47	£0.21	£3.49	£0.82	£0.08	£0.15	£0.28	£5.68
Oswestry Sub-Total	£0.91	£3.25	£10.76	£6.15	£23.64	£11.05	£0.82	£6.58	£3.32	£66.48
Stans Supermarket, St Martins	£0.36	£1.62	£1.25	£4.67	£0.27	£0.14	£0.00	£0.15	£0.00	£8.45
Local Shops Pant	£0.00	£0.00	£0.31	£0.00	£0.00	£0.27	£0.00	£0.15	£0.00	£0.73
Local shops Gobowen	£0.00	£0.00	£0.31	£0.42	£0.00	£0.14	£0.00	£0.00	£0.00	£0.87
Other study area	£1.81	£6.23	£0.47	£3.18	£0.00	£0.41	£0.74	£2.92	£0.00	£15.76
Wrexham	£13.58	£12.45	£1.25	£2.76	£1.61	£0.41	£0.00	£0.15	£0.00	£32.21
Shrewsbury	£0.00	£0.27	£0.78	£2.97	£1.07	£0.95	£5.82	£1.17	£0.00	£13.04
Welshpool	£0.00	£0.00	£0.16	£0.00	£0.27	£0.14	£0.00	£3.36	£0.00	£3.92
Other outflow	£1.45	£3.25	£0.31	£1.06	£0.00	£0.14	£0.82	£0.15	£0.00	£7.17
Total	***£18.11***	***£27.07***	***£15.59***	***£21.22***	***£26.87***	***£13.64***	***£8.20***	***£14.62***	***£3.32***	***£148.63***

Table 7B: **Convenience Expenditure 2016 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend
Expenditure 2016	**£19.48**	**£29.11**	**£16.77**	**£22.82**	**£28.90**	**£14.68**	**£8.82**	**£15.73**	**n/a**	
Sainsbury Oswestry	£0.19	£1.75	£6.37	£3.65	£11.56	£6.31	£0.44	£3.78	£1.79	£35.85
Somerfield, Oswestry	£0.19	£0.58	£2.68	£1.14	£5.78	£2.64	£0.09	£1.10	£0.75	£14.96
Iceland,Oswestry	£0.19	£0.29	£0.17	£0.00	£0.58	£0.29	£0.00	£0.47	£0.11	£2.10
Kwik Save, Oswestry	£0.00	£0.29	£0.67	£0.23	£1.45	£0.29	£0.00	£0.47	£0.18	£3.58
Aldi, Oswestry	£0.19	£0.58	£1.17	£1.37	£2.31	£1.47	£0.26	£1.10	£0.45	£8.91
Other town centre shops	£0.19	£0.00	£0.50	£0.23	£3.76	£0.88	£0.09	£0.16	£0.31	£6.12
Oswestry Sub-Total	**£0.97**	**£3.49**	**£11.57**	**£6.62**	**£25.43**	**£11.89**	**£0.88**	**£7.08**	**£3.58**	**£71.52**
Stans Supermarket, St Martins	£0.39	£1.75	£1.34	£5.02	£0.29	£0.15	£0.00	£0.16	£0.00	£9.09
Local Shops Pant	£0.00	£0.00	£0.34	£0.00	£0.00	£0.29	£0.00	£0.16	£0.00	£0.79
Local shops Gobowen	£0.00	£0.00	£0.34	£0.46	£0.00	£0.15	£0.00	£0.00	£0.00	£0.94
Other study area	£1.95	£6.70	£0.50	£3.42	£0.00	£0.44	£0.79	£3.15	£0.00	£16.95
Wrexham	£14.61	£13.39	£1.34	£2.97	£1.73	£0.44	£0.00	£0.16	£0.00	£34.64
Shrewsbury	£0.00	£0.29	£0.84	£3.19	£1.16	£1.03	£6.26	£1.26	£0.00	£14.03
Welshpool	£0.00	£0.00	£0.17	£0.00	£0.29	£0.15	£0.00	£3.62	£0.00	£4.22
Other outflow	£1.56	£3.49	£0.34	£1.14	£0.00	£0.15	£0.88	£0.16	£0.00	£7.71
Total	***£19.48***	***£29.11***	***£16.77***	***£22.82***	***£28.90***	***£14.68***	***£8.82***	***£15.73***	***£3.58***	***£159.89***

Table 8B: **Convenience Expenditure 2021 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend
Expenditure 2021	**£20.70**	**£30.92**	**£17.81**	**£24.24**	**£30.70**	**£15.58**	**£9.36**	**£16.70**	**n/a**	
Sainsbury Oswestry	£0.21	£1.86	£6.77	£3.88	£12.28	£6.70	£0.47	£4.01	£1.90	£38.06
Somerfield, Oswestry	£0.21	£0.62	£2.85	£1.21	£6.14	£2.80	£0.09	£1.17	£0.79	£15.89
Iceland,Oswestry	£0.21	£0.31	£0.18	£0.00	£0.61	£0.31	£0.00	£0.50	£0.11	£2.23
Kwik Save, Oswestry	£0.00	£0.31	£0.71	£0.24	£1.53	£0.31	£0.00	£0.50	£0.19	£3.80
Aldi, Oswestry	£0.21	£0.62	£1.25	£1.45	£2.46	£1.56	£0.28	£1.17	£0.47	£9.46
Other town centre shops	£0.21	£0.00	£0.53	£0.24	£3.99	£0.93	£0.09	£0.17	£0.32	£6.49
Oswestry Sub-Total	**£1.03**	**£3.71**	**£12.29**	**£7.03**	**£27.01**	**£12.62**	**£0.94**	**£7.52**	**£3.80**	**£75.94**
Stans Supermarket, St Martins	£0.41	£1.86	£1.42	£5.33	£0.31	£0.16	£0.00	£0.17	£0.00	£9.66
Local Shops Pant	£0.00	£0.00	£0.36	£0.00	£0.00	£0.31	£0.00	£0.17	£0.00	£0.83
Local shops Gobowen	£0.00	£0.00	£0.36	£0.48	£0.00	£0.16	£0.00	£0.00	£0.00	£1.00
Other study area	£2.07	£7.11	£0.53	£3.64	£0.00	£0.47	£0.84	£3.34	£0.00	£18.00
Wrexham	£15.52	£14.22	£1.42	£3.15	£1.84	£0.47	£0.00	£0.17	£0.00	£36.80
Shrewsbury	£0.00	£0.31	£0.89	£3.39	£1.23	£1.09	£6.65	£1.34	£0.00	£14.89
Welshpool	£0.00	£0.00	£0.18	£0.00	£0.31	£0.16	£0.00	£3.84	£0.00	£4.48
Other outflow	£1.66	£3.71	£0.36	£1.21	£0.00	£0.16	£0.94	£0.17	£0.00	£8.19
Total	**£20.70**	**£30.92**	**£17.81**	**£24.24**	**£30.70**	**£15.58**	**£9.36**	**£16.70**	**£3.80**	**£169.79**

Table 9B Summary of Convenience Turnover 2006 to 2026

Town	2006	2011	2016	2021
Available Expenditure				
Sainsbury Oswestry	£30.63	£33.32	£35.85	£38.06
Somerfield, Oswestry	£12.79	£13.91	£14.96	£15.89
Iceland,Oswestry	£1.80	£1.95	£2.10	£2.23
Kwik Save, Oswestry	£3.06	£3.33	£3.58	£3.80
Aldi, Oswestry	£7.61	£8.28	£8.91	£9.46
Other Oswestry local shops	£5.23	£5.68	£6.12	£6.49
Borough Total	**£61.11**	**£66.48**	**£71.52**	**£75.94**
Benchmark Turnover of Existing Facilities				
Sainsbury Oswestry	£19.57	£19.87	£20.17	£20.47
Somerfield, Oswestry	£7.40	£7.51	£7.63	£7.74
Iceland,Oswestry	£2.69	£2.73	£2.77	£2.82
Kwik Save, Oswestry	£2.96	£3.01	£3.05	£3.10
Aldi, Oswestry	£1.77	£1.80	£1.82	£1.85
Other Oswestry local shops	£6.25	£6.34	£6.44	£6.54
Borough Total	**£40.64**	**£41.26**	**£41.88**	**£42.51**
Surplus Expenditure				
Sainsbury Oswestry	£11.06	£13.46	£15.68	£17.60
Somerfield, Oswestry	£5.39	£6.40	£7.34	£8.15
Iceland,Oswestry	-£0.90	-£0.78	-£0.67	-£0.58
Kwik Save, Oswestry	£0.10	£0.32	£0.53	£0.70
Aldi, Oswestry	£5.84	£6.49	£7.09	£7.61
Other Oswestry local shops	-£1.02	-£0.66	-£0.32	-£0.04
Borough Total	**£20.47**	**£25.22**	**£29.64**	**£33.43**

Appendix C

Comparison Retail Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2004 Prices)

Expenditure Per Capita	2006	2011	2016	2021	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021
Zone 1	£2,758	£3,245	£3,835	£4,577	17.7%	39.1%	66.0%
Zone 2	£2,415	£2,842	£3,359	£4,008	17.7%	39.1%	66.0%
Zone 3	£2,646	£3,114	£3,680	£4,392	17.7%	39.1%	66.0%
Zone 4	£2,561	£3,013	£3,561	£4,249	17.6%	39.0%	65.9%
Zone 5	£2,938	£3,457	£4,086	£4,876	17.7%	39.1%	66.0%
Zone 6	£2,738	£3,221	£3,807	£4,543	17.6%	39.0%	65.9%
Zone 7	£2,737	£3,220	£3,805	£4,542	17.6%	39.0%	65.9%
Zone 8	£2,512	£2,956	£3,494	£4,170	17.7%	39.1%	66.0%

Sources:

Experian local estimates of 2004 comparison goods expenditure per capita

Excluding special froms of trading - 4.4% in 2004, 5.2% in 2006, 6.8% in 2011 and 6.9% in 2016/2021

Experian Business Strategies - recommended forecast growth rates

(3.9% per annum between 2004 to 2009, 3.3% between 2009 to 2014 and 3.6% between 2014 and 2021)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2004 Prices)

Catchment Area	2006	2011	2016	2021	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021
Zone 1	£30.30	£36.76	£44.42	£54.31	21.3%	46.6%	79.2%
Zone 2	£40.64	£49.31	£59.59	£72.85	21.3%	46.6%	79.3%
Zone 3	£23.16	£28.10	£33.95	£41.51	21.3%	46.6%	79.3%
Zone 4	£33.53	£40.67	£49.15	£60.09	21.3%	46.6%	79.2%
Zone 5	£46.86	£56.84	£68.70	£83.99	21.3%	46.6%	79.3%
Zone 6	£21.14	£25.64	£30.99	£37.89	21.3%	46.6%	79.2%
Zone 7	£14.51	£17.61	£21.27	£26.02	21.3%	46.6%	79.2%
Zone 8	£22.22	£26.96	£32.58	£39.84	21.3%	46.6%	79.3%
Total	**£232.36**	**£281.89**	**£340.67**	**£416.51**	**21.3%**	**46.6%**	**79.2%**

Sources: *Table 1B and Table 1C*

Table 3C: **Comparison Shopping Penetration Rates 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expenditure
Market Share										
Oswestry	4%	15%	48%	29%	54%	43%	13%	34%	5%	
Other in Study Area	4%	6%	2%	7%	1%	1%	1%	3%	n/a	
Wrexham	64%	57%	17%	22%	13%	10%	2%	6%	n/a	
Shrewsbury	1%	1%	18%	27%	20%	32%	72%	32%	n/a	
Chester	20%	14%	9%	7%	7%	7%	3%	5%	n/a	
Other Outflow	7%	5%	6%	8%	5%	6%	9%	20%	n/a	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	

Table 4C: ***Comparison Shopping Available Expenditure 2006***

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expenditure
Turnover £M	**£30.30**	**£40.64**	**£23.16**	**£33.53**	**£46.86**	**£21.14**	**£14.51**	**£22.22**	**n/a**	**£232.36**
Oswestry	£1.21	£6.26	£11.03	£9.84	£25.44	£9.14	£1.88	£7.51	£3.81	**£76.12**
Other in Study Area	£1.08	£2.59	£0.54	£2.34	£0.43	£0.16	£0.17	£0.77	£0.00	**£8.08**
Wrexham	£19.30	£23.25	£3.97	£7.29	£6.22	£2.18	£0.27	£1.40	£0.00	**£63.87**
Shrewsbury	£0.44	£0.60	£4.18	£9.05	£9.24	£6.78	£10.40	£7.09	£0.00	**£47.78**
Chester	£6.01	£5.84	£2.16	£2.25	£3.23	£1.54	£0.42	£1.06	£0.00	**£22.51**
Other Outflow	£2.26	£2.10	£1.28	£2.75	£2.31	£1.34	£1.37	£4.40	£0.00	**£17.82**
Total Turnover	***£30.30***	***£40.64***	***£23.16***	***£33.53***	***£46.86***	***£21.14***	***£14.51***	***£22.22***	***n/a***	***£236.17***

Table 5C: **Comparison Shopping Available Expenditure 2011 (with existing market shares)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend.
Available Expenditure 2011	**£36.76**	**£49.31**	**£28.10**	**£40.67**	**£56.84**	**£25.64**	**£17.61**	**£26.96**		**£281.89**
Turnover £M										
Oswestry	£1.47	£7.59	£13.39	£11.94	£30.86	£11.09	£2.28	£9.11	£4.62	**£92.34**
Other in Study Area	£1.31	£3.14	£0.65	£2.84	£0.52	£0.19	£0.21	£0.93	£0.00	**£9.80**
Wrexham	£23.41	£28.21	£4.82	£8.85	£7.54	£2.64	£0.33	£1.69	£0.00	**£77.48**
Shrewsbury	£0.54	£0.73	£5.07	£10.98	£11.20	£8.22	£12.62	£8.60	£0.00	**£57.96**
Chester	£7.29	£7.09	£2.62	£2.73	£3.91	£1.87	£0.51	£1.28	£0.00	**£27.30**
Other Outflow	£2.74	£2.55	£1.56	£3.34	£2.80	£1.63	£1.67	£5.33	£0.00	**£21.62**
Total Turnover	***£36.76***	***£49.31***	***£28.10***	***£40.67***	***£56.84***	***£25.64***	***£17.61***	***£26.96***	***n/a***	***£286.50***

Table 6C: **Comparison Shopping Available Expenditure 2016 (with existing market shares)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend.
Available Expenditure 2016	**£44.42**	**£59.59**	**£33.95**	**£49.15**	**£68.70**	**£30.99**	**£21.27**	**£32.58**		**£340.67**
Turnover £M										
Oswestry	£1.77	£9.18	£16.18	£14.43	£37.30	£13.40	£2.75	£11.02	£5.58	**£111.60**
Other in Study Area	£1.58	£3.80	£0.79	£3.44	£0.62	£0.23	£0.25	£1.13	£0.00	**£11.85**
Wrexham	£28.29	£34.09	£5.82	£10.69	£9.12	£3.19	£0.40	£2.05	£0.00	**£93.64**
Shrewsbury	£0.65	£0.88	£6.13	£13.26	£13.54	£9.94	£15.25	£10.40	£0.00	**£70.05**
Chester	£8.82	£8.57	£3.16	£3.30	£4.73	£2.26	£0.61	£1.55	£0.00	**£33.00**
Other Outflow	£3.31	£3.08	£1.88	£4.04	£3.39	£1.97	£2.01	£6.45	£0.00	**£26.12**
Total Turnover	***£44.42***	***£59.59***	***£33.95***	***£49.15***	***£68.70***	***£30.99***	***£21.27***	***£32.58***	***n/a***	***£346.25***

Table 7C **Comparison Shopping Available Expenditure 2021 (with exisitng market shares)**

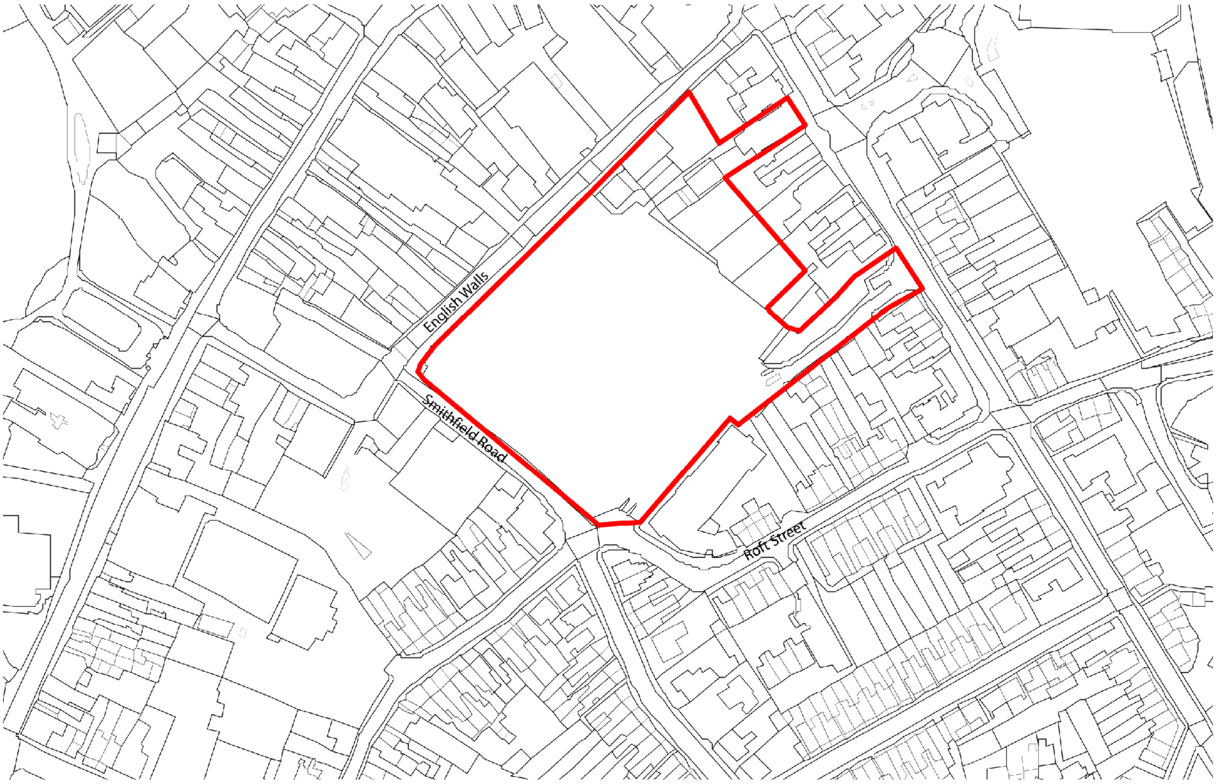
Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend.
Available Expenditure 2021	**£54.31**	**£72.85**	**£41.51**	**£60.09**	**£83.99**	**£37.89**	**£26.02**	**£39.84**		**£416.51**
Turnover £M										
Oswestry	£2.17	£11.22	£19.78	£17.64	£45.60	£16.38	£3.37	£13.47	£6.82	**£136.44**
Other in Study Area	£1.94	£4.65	£0.96	£4.20	£0.76	£0.29	£0.30	£1.38	n/a	**£14.48**
Wrexham	£34.59	£41.67	£7.12	£13.07	£11.14	£3.90	£0.48	£2.50	n/a	**£114.48**
Shrewsbury	£0.80	£1.08	£7.49	£16.21	£16.56	£12.15	£18.65	£12.71	n/a	**£85.64**
Chester	£10.78	£10.48	£3.86	£4.03	£5.78	£2.76	£0.75	£1.89	n/a	**£40.34**
Other Outflow	£4.05	£3.77	£2.30	£4.93	£4.14	£2.40	£2.46	£7.88	n/a	**£31.94**
Total Turnover	***£54.31***	***£72.85***	***£41.51***	***£60.09***	***£83.99***	***£37.89***	***£26.02***	***£39.84***	***n/a***	***£423.33***

Table 8C: Summary of Comparison Expenditure/Turnover 2006 to 2021 £M (With existing market shares)

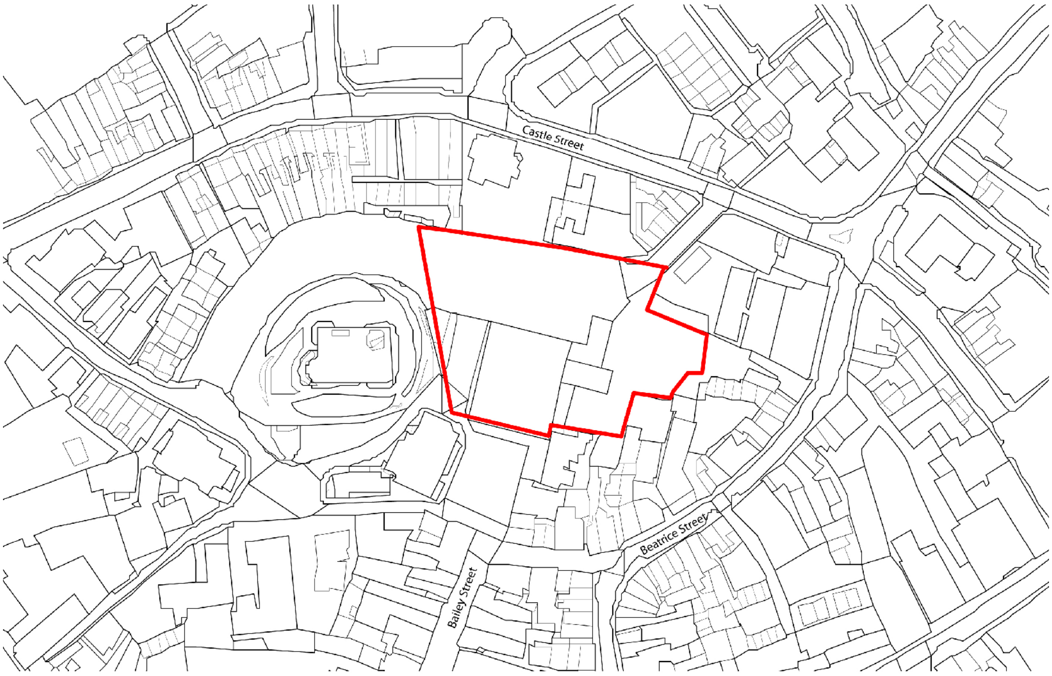
Centre	2006	2011	2016	2021
Available Expenditure Oswestry	£76.12	£92.34	£111.60	£136.44
Turnover of Existing Floorspace Oswestry	£76.12	£82.00	£88.34	£95.16
Surplus Expenditure Oswestry	n/a	£10.34	£23.26	£41.28

Appendix D

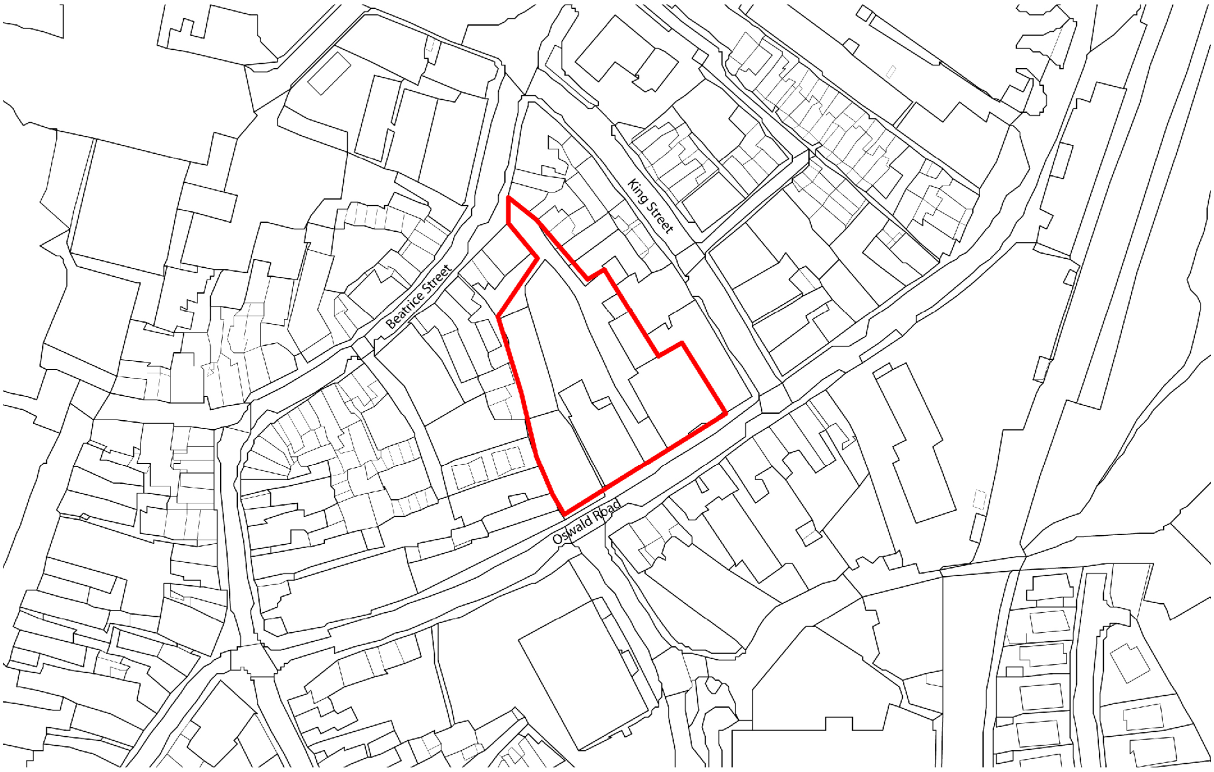
Site Opportunity Appraisals



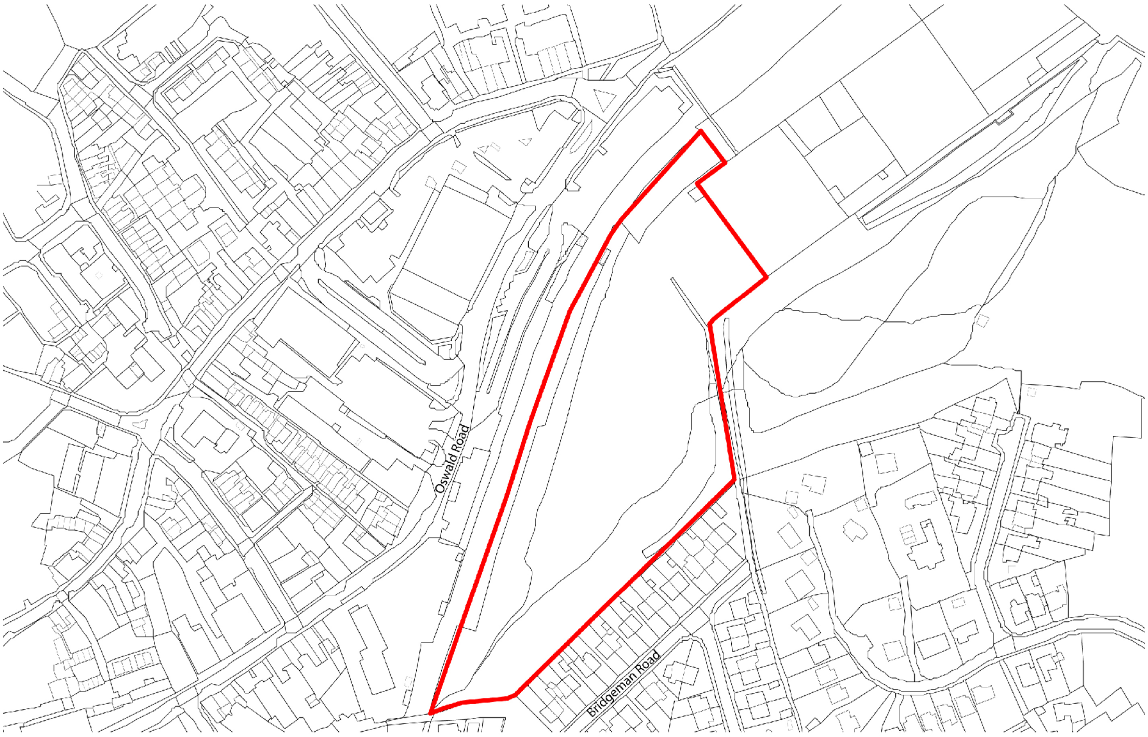
Site	Central Car Park
Area	1.2 ha
Location	Adjacent to existing Retail Development Area defined in Local Plan. Could be considered town or edge of centre in PPS6 terms
Existing land uses and availability	Public car park in ownership of Town Council. Short to medium term prospect.
Commercial potential	Prime
Potential development scope	Large scale. Could accommodate a stand alone food store with parking
Constraints and alternative land uses	Release of site would need to be informed by a car park review and town centre traffic appraisal. Potential for mixed use town centre development.
Overall Potential	Good



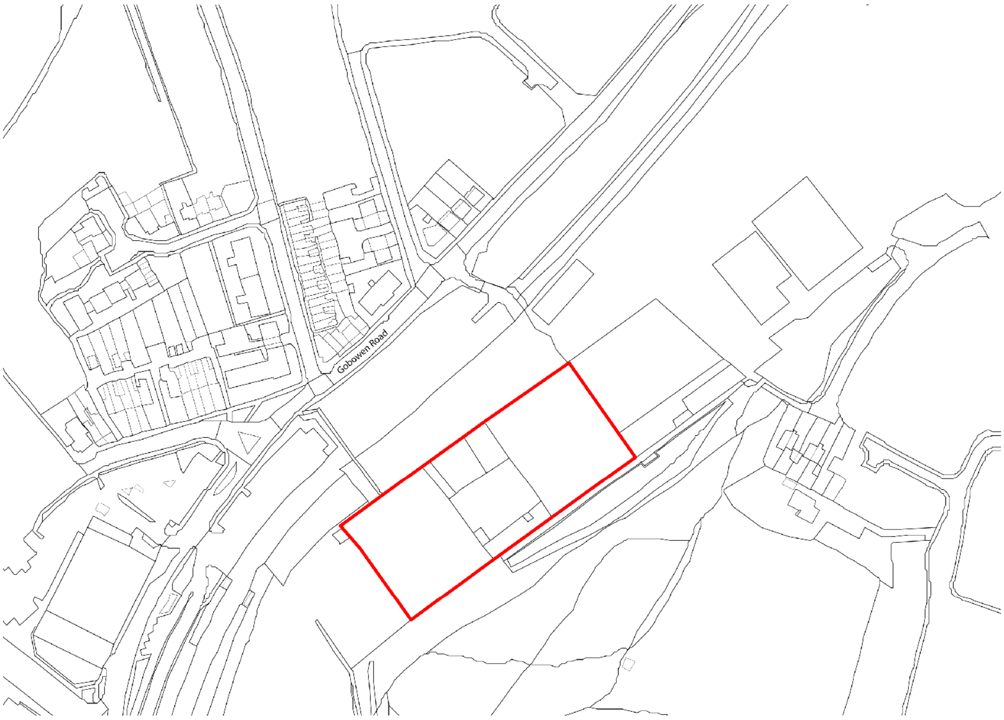
Site	Market Hall/Horsemarket and adjoining land
Area	0.5 ha
Location	Currently within the Retail Development Area. Would be considered town centre in PPS6 terms
Existing land uses and availability	Market Hall and Horsemarket in ownership of Town Council. Not in daily use. Adjoining land in private ownership. Short to medium term availability.
Commercial potential	Prime
Potential development scope	Medium to large depending on land assembly
Constraints and alternative land uses	Adjoining land may require land assembly and/or compulsory purchase. Development would need to take account the setting of the Castle Mound and Guild Hall.
Overall Potential	Reasonable



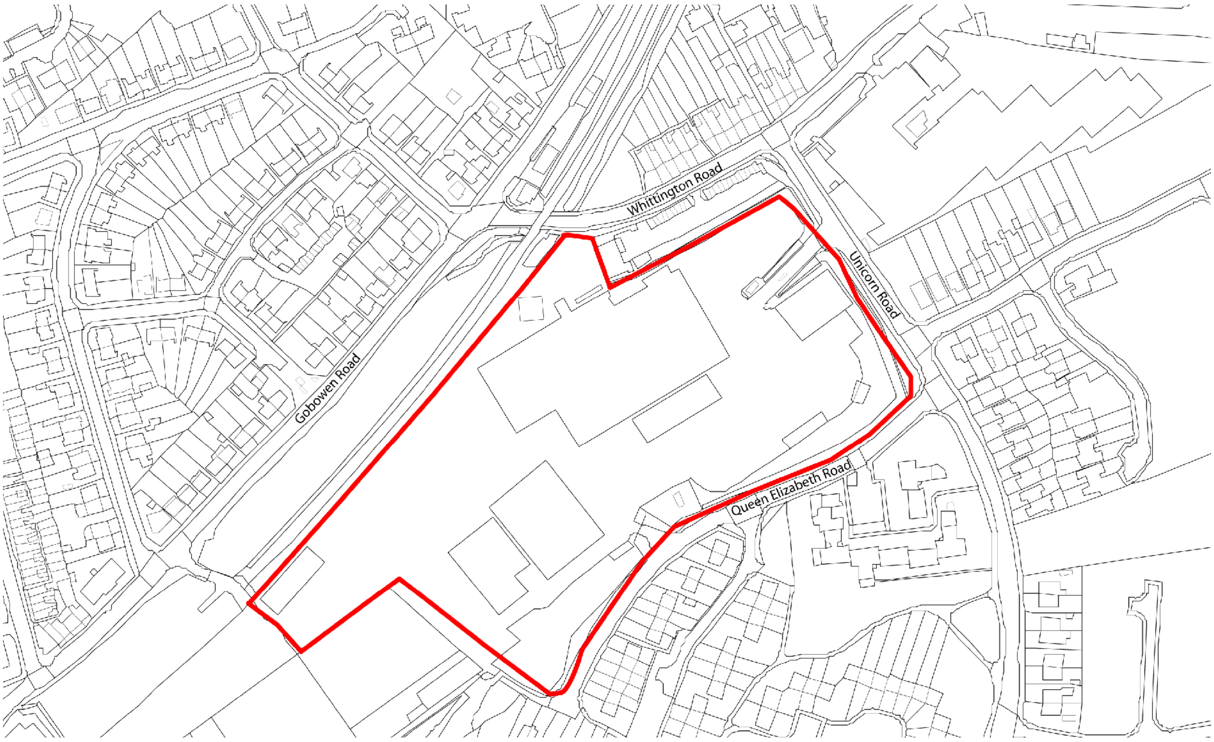
Site	Land between Oswald Road and Beatrice Street
Area	0.2 ha
Location	Currently within the Retail Development Area. Would be considered town centre in PPS6 terms
Existing land uses and availability	An infill and backland development opportunity currently occupied by some existing retail units, a garage and private car parking. Medium to long term availability
Commercial potential	Prime
Potential development scope	Medium (net increase)
Constraints and alternative land uses	Ideally suited to town centre retail however, number of land owners would require careful land assembly
Overall Potential	Reasonable



Site	Railway Land, Oswald Road
Area	2.0 ha
Location	Could be edge of centre or out of centre depending on connectivity
Existing land uses and availability	Incidental space adjacent to railway land in ownership of Advantage West Midlands. Short term availability, subject to Village Green application.
Commercial potential	Secondary
Potential development scope	Large
Constraints and alternative land uses	Site has outline planning permission for a new health centre, medical village and other uses. Could be subject to a further Village Green application, which if successful, could render it undevelopable.
Overall Potential	Poor

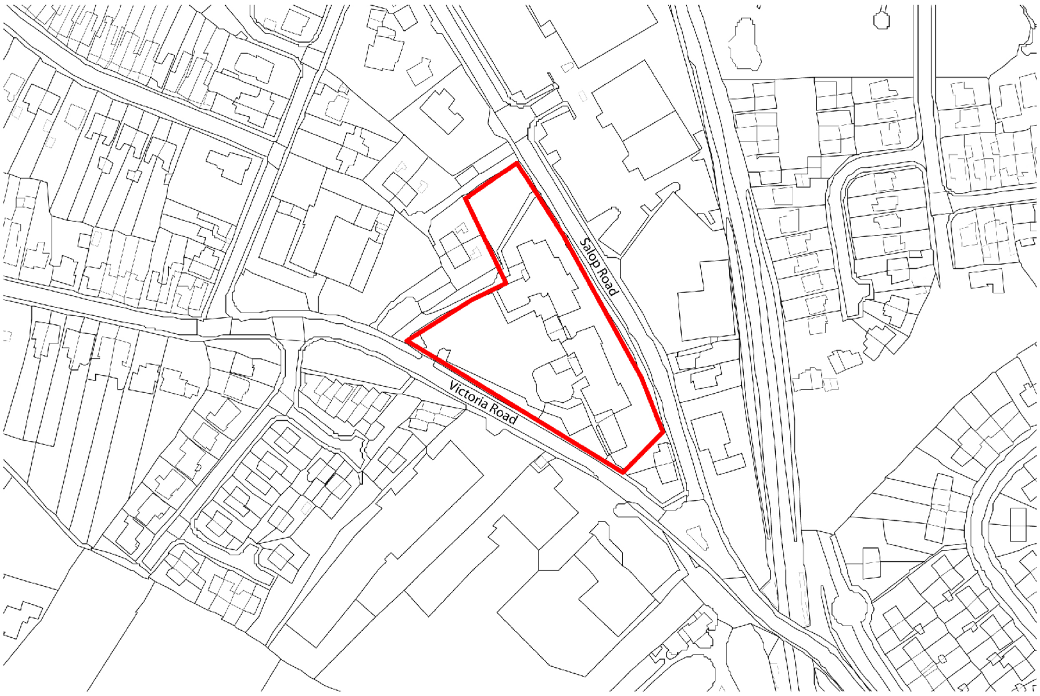


Site	Former Cambrian Works Building, Oswald Road
Area	0.4 ha
Location	Out of centre
Existing land uses and availability	Central bays of the former Cambrian Works building leased to McLaren Furniture. Bays to the north could become available in the short term and have permission for storage and distribution (Class B8). Bays to the south (nearest the town centre) could also become available.
Commercial potential	Secondary
Potential development scope	Large – potential exists for up to 3,700 sq m gross retail
Constraints and alternative land uses	Could be suitable for some light industrial or incubator business space. Floorspace inflexible due to existing building constraints.
Overall Potential	Reasonable, constrained by its out-of-centre location and configuration

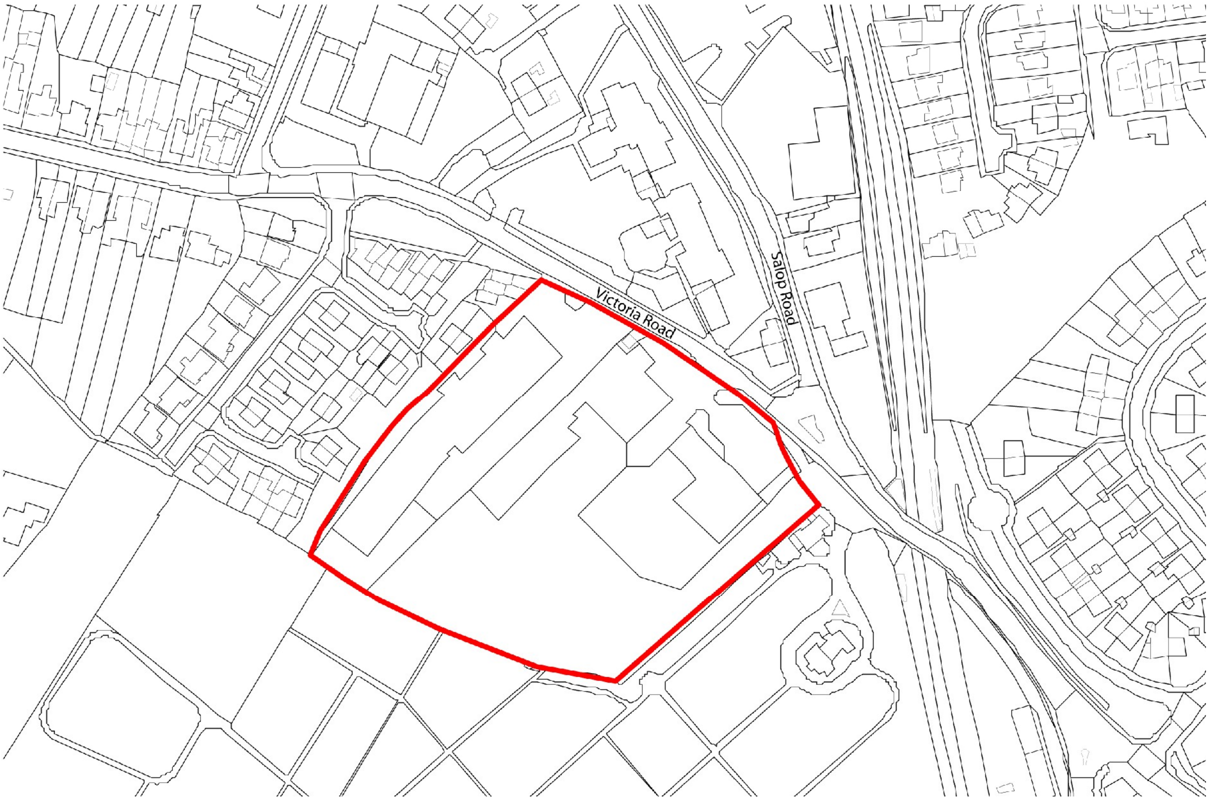


Site	Richard Burbidge Site, Unicorn Road
Area	4.5 ha
Location	Out of Centre
Existing land uses and availability	Currently in use as wood products factory, storage and distribution facility. Medium term availability
Commercial potential	Secondary
Potential development scope	Large
Constraints and alternative land uses	Existing factory use would need to be relocated elsewhere in the town. Could be suitable for housing or employment
Overall Potential	Reasonable

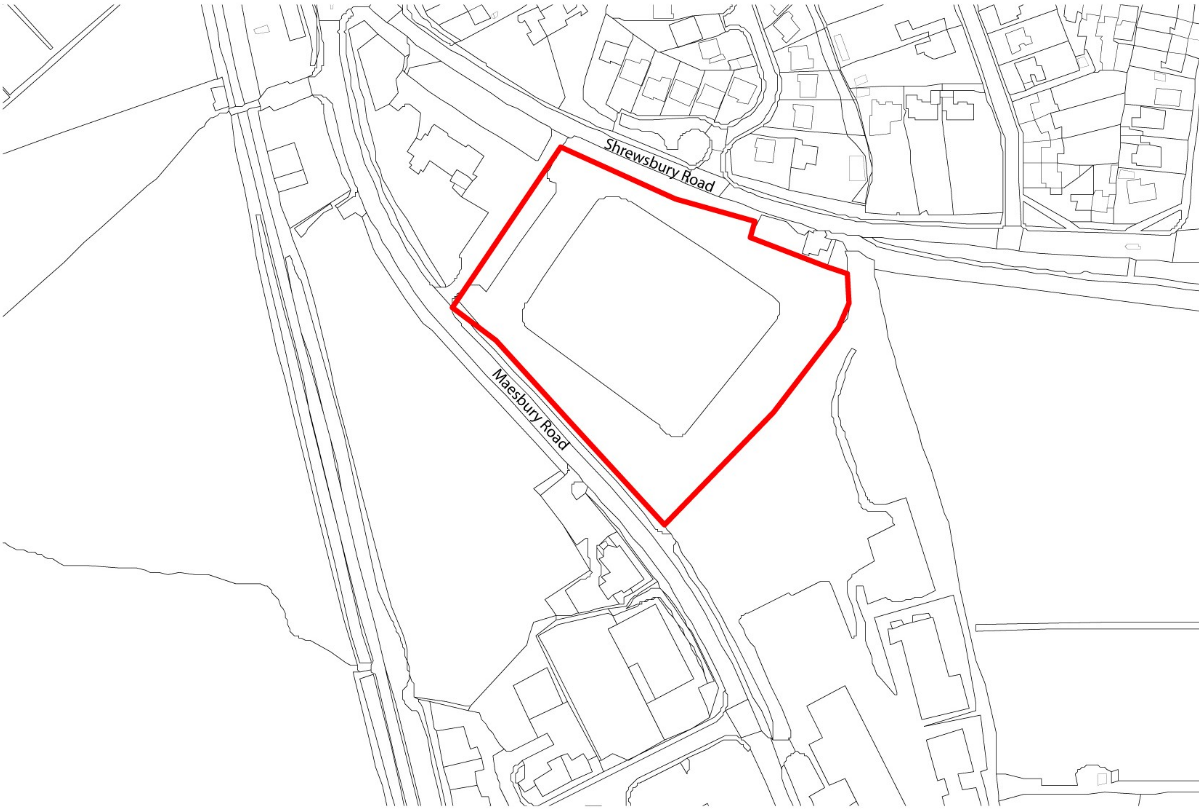
Site	Arriva Bus Depot, Salop Road
Area	0.3 ha
Location	Out of centre but adjacent to existing Penda Retail Park
Existing land uses and availability	In use as Arriva Bus Depot. Short term to medium term availability.
Commercial potential	Off-prime
Potential development scope	Medium
Constraints and alternative land uses	Existing bus depot would need to be relocated
Overall Potential	Reasonable



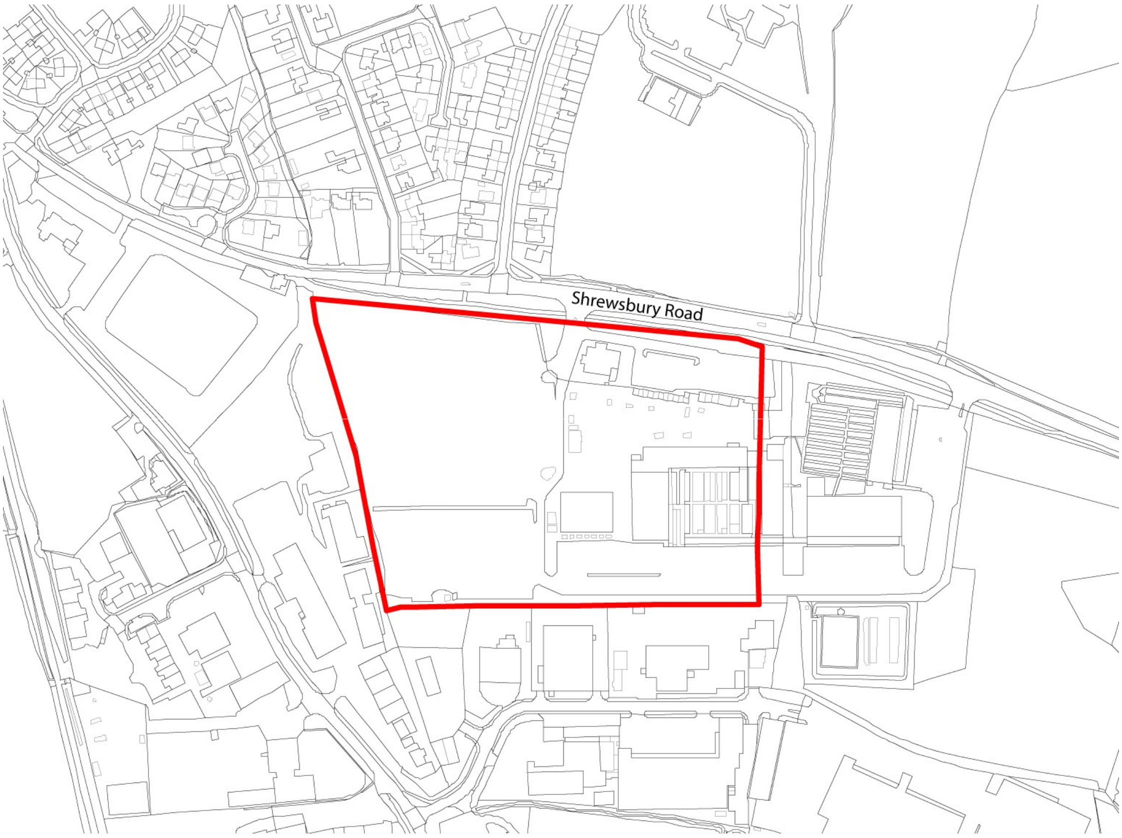
Site	Adult Training Centre/Medical Centre Victoria Road
Area	0.7 ha
Location	Out of centre
Existing land uses and availability	Existing Adult Training Centre surplus to requirements. Medical centre would become available if development at Railway Land site proceeded. Medium to long term availability depending on Railway Land site.
Commercial potential	Secondary
Potential development scope	Large
Constraints and alternative land uses	Comprehensive redevelopment dependant on relocation of health centre to Railway Land site. Suitable for residential redevelopment. Off pitch location would make it unsuitable for comparison goods retailer, could be suitable for a neighbourhood foodstore.
Overall Potential	Reasonable



Site	J T Hughes Garage/ Guttercrest, Victoria Road
Area	1.85 ha
Location	Out of centre
Existing land uses and availability	Currently in use as factory and car dealership. Could become available in the short term.
Commercial potential	Secondary
Potential development scope	Large
Constraints and alternative land uses	Land assembly required comprehensive redevelopment dependent on relocation of car dealership and factory. Has potential to link with redevelopment of Adult Training Centre/Medical Centre (see above). Would be suitable for residential use.
Overall Potential	Reasonable



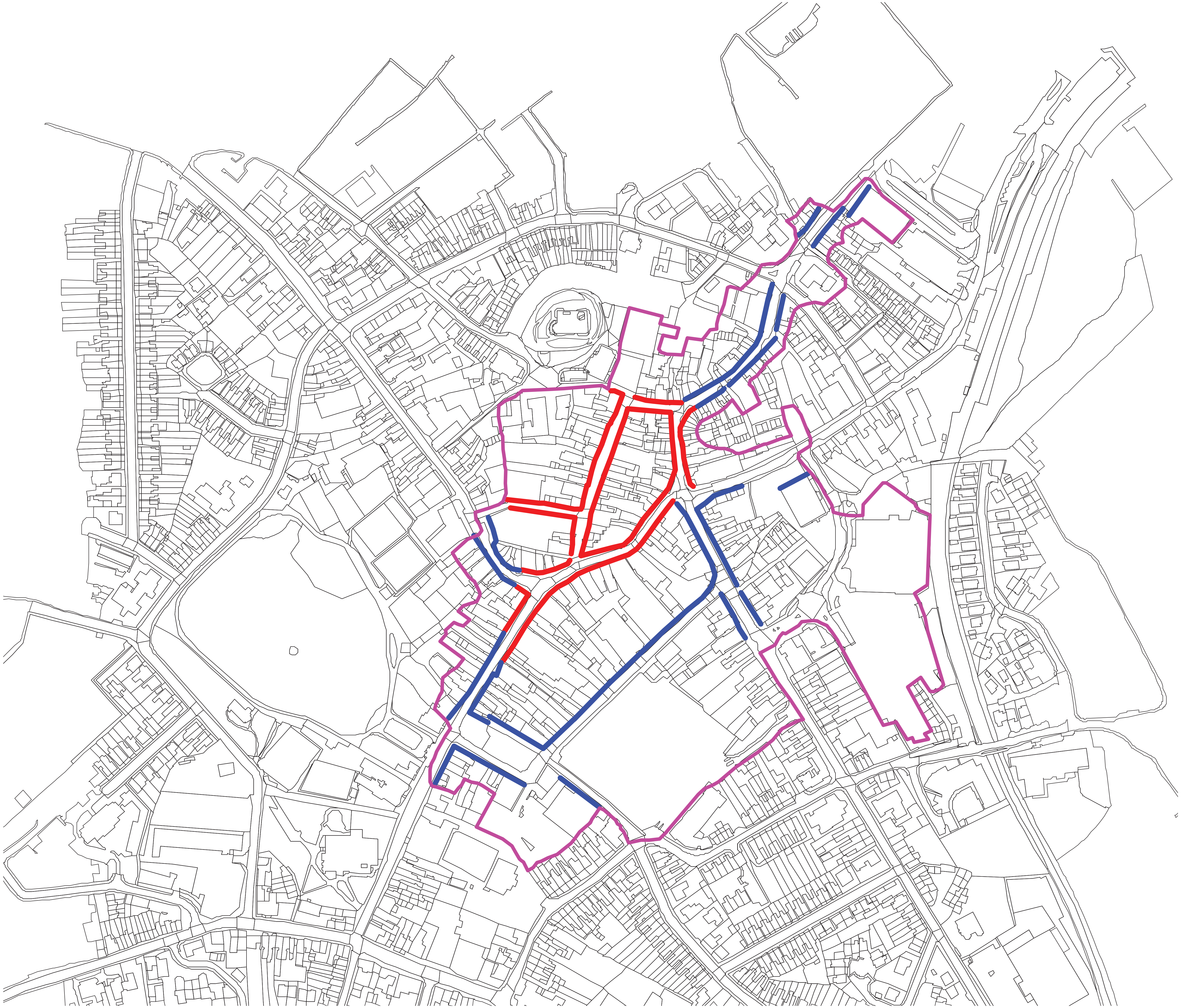
Site	Land adjacent to Highwayman Public House
Area	1.4 ha
Location	Out of centre
Existing land uses and availability	Privately owned recreational land in ownership of Wolverhampton and Dudley Breweries. Short term availability.
Commercial potential	Secondary but with good visible presence off main road
Potential development scope	Large
Constraints and alternative land uses	Suitable for residential use. Unsuitable for retail given distance from town centre and residential areas.
Overall Potential	Poor



Site	Land at Smithfield Livestock Market
Area	6 ha
Location	Out of centre
Existing land uses and availability	Land within existing market complex but which could become surplus to operational requirements. Within the ownership of Oswestry Town Council. Medium term
Commercial potential	Secondary
Potential development scope	Large
Constraints and alternative land uses	Unsuitable for town centre use given distance from town centre,
Overall Potential	Poor

Appendix E

Recommended Town Centre Retail Designations



KEY

Primary Shopping Area

Primary Shopping Frontage

Secondary Frontage

Nathaniel Lichfield and Partners

Project	Oswestry Retail Study
Title	**Proposed Town Centre Retail Designation**
Client	Oswestry Borough Council
Date	December 2006
Scale	NTS
Drawn by	IJ
Drg. No	IL40259/01

N

IL40259/01