Shropshire Council

Shrewsbury Retail Policy Advice
Final Report

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1 INTRODUCTION

Background

1.1 Shropshire Council is in the process of preparing a Site Allocations and Management of Development Plan (SAMdev) which will set out proposals for the use of land and policies to guide future development and deliver the vision and objectives of the Shropshire Core Strategy which was adopted in February 2011. To date the Council has relied on the Shrewsbury Retail Study Update (SRSU) of February 2012 to inform the SAMdev, which is now at final draft stage.

1.2 The SRSU updated the Shrewsbury Retail Study of November 2010 to provide a revised retail need capacity assessment over the period to 2026 and an up-to-date assessment of the performance of Shrewsbury Town Centre. The SRSU was based on the findings of a household telephone survey undertaken in April 2010 to inform the Shrewsbury Retail Study. The survey examined the shopping patterns of residents within a catchment area based on a 20 minute drivetime from Shrewsbury that was amended to take account of the influence of competing centres, such as Telford. The study area consisted of six zones within which a primary catchment area (PCA) was identified, comprising the Shrewsbury urban area.

Purpose of this Report

1.3 This report was commissioned by Shropshire Council in May 2014 and seeks to update the quantitative assessment of retail floorspace requirements presented within the SRSU. The purpose of the update is to take account of the most up-to-date population estimates, retail expenditure forecasts and committed retail developments that have been granted planning permission since the time of the 2012 study.

1.4 The figures in this update report supersede those set out within the SRSU, but the individual survey zones used in the 2010 and 2012 studies have remained unchanged. The household survey figures from the 2010 study have been applied to the latest population and expenditure data from Experian to provide the latest position on available expenditure and floorspace requirements in the comparison and convenience retail sectors. The use of the 2010 survey figures continues to be robust given the limited retail development that has occurred in the study area since that date.

1.5 This update also takes account of any over-trading in the convenience retail sector, new commitments for additional retail floorspace, changes to expenditure growth rates, sales density growth and the claim of special forms of trading (i.e. non-store trading). The updated capacity assessment provides figures for appropriate interval years up to 2026 and our findings are used to provide recommendations in respect of the appropriate approach to accommodating any additional retail floorspace requirements over the plan period.

Structure of the Report

1.6 The remainder of this update report is structured as follows:

- Section 2 summarises the key findings from the SRSU in relation to retail expenditure capacity;
- Section 3 describes the data inputs which have informed this update report;
- Section 4 sets out the updated retail capacity forecasts for convenience and comparison goods; and
- Section 5 provides our recommendations in terms of the development of local planning policy.

2 KEY FINDINGS FROM THE SRSU

Convenience Retail Goods

2.1 The Shrewsbury Retail Study Update (SRSU) of 2012 concluded that there was a significant identified quantitative need for additional convenience retail provision within the PCA. The identified requirement was for between 2,840 sq. m and 6,824 sq. m of additional sales area floorspace in 2011 rising steadily over the period to 2026 when a requirement for between 4,381 sq. m and 10,528 sq. m sales area floorspace was identified (depending on operator and format).

2.2 However, at the time of the study, the Council had recently approved a significant extension to the Sainsbury's store at Meole Brace and was considering a further application for an extension to the Tesco store at Battlefield Road. The report noted that these two developments would extinguish a substantial proportion of the short term convenience goods quantitative need that had been identified.

2.3 In addition, owing to the relative lack of convenience goods provision within Shrewsbury Town Centre, combined with very few opportunities to deliver a significant foodstore within or on the edges of the town centre, the study concluded that the four major foodstores (all located out-of-centre) '*do little to underpin the health of the town centre or to act as an anchor to attract custom*'.

Recommendations

2.4 Due to the constrained opportunities for foodstore development within the town centre, the SRSU suggested that the Council may need to look at edge-of-centre and out-of-centre sites to meet the identified convenience retail floorspace requirements through to 2026.

2.5 However, meeting the identified need was not considered a pressing or urgent task as much of it could be accommodated within the proposals and permissions already in the planning pipeline. As such, the SRSU advised that it was not necessary for the Council to plan for additional convenience goods retail floorspace through the allocation of out-of-centre sites.

2.6 Accordingly, it was recommended that the Council would need to consider future convenience floorspace proposals against the sequential test and the cumulative impacts arising from the granting of multiple planning permissions. This would help to ensure that future development in Shrewsbury is accessible by a range of transport choices and as closely linked as possible to the town centre.

Comparison Retail Goods

2.7 The 2012 update concluded that as a result of modest comparison goods expenditure growth and the significant level of outstanding commitments, there was no quantitative need for additional comparison goods facilities until after 2021. Instead it identified a requirement for between 5,240 sq. m and 8,734 sq. m of sales area floorspace by 2026 (depending on operator and format). This was substantially less than was estimated by the 2010 Retail Study.

2.8 At the time of the previous update, the existing commitments were identified to have a potential turnover in the order of £50.74m (assuming that all of the proposals are delivered). Account was also taken of the comparison goods floorspace included within the Sainsbury's (Meole Brace) and Tesco (Battlefield Road). Consequently, the report concluded that the provision of planned comparison retail development would claim significant expenditure and (if approved) should be taken into account when assessing future retail applications in Shrewsbury.

2.9 The proposed New Riverside development was referred to in the SRSU as a 'once in a generation' opportunity to provide modern retail floorspace catering for major high street retailers within the town centre. The SRSU emphasised that the failure to accommodate such operators was Shrewsbury's main deficiency, and as such the delivery of a successful scheme was vital to safeguard the long-term health of the town centre. The report advised the Council to '*act proactively and to target resources efficiently whereby the potential regeneration of New Riverside is given the best possible opportunity to succeed'.*

2.10 The report concluded that without a comprehensive town centre redevelopment opportunity, pressure for retail provision in out-of-centre retail locations will continue to increase, to the detriment of the vitality and viability of Shrewsbury Town Centre.

Recommendations

2.11 The update report of 2012 recommended that the role and function of the retail parks would need to be managed, to ensure that they provide a complementary offer to Shrewsbury Town Centre. It emphasised that any significant change in the range, offer or size of the retail parks could strengthen their competitive position and cause the vitality and viability of the town centre to suffer.

2.12 Conversely, the study advised that if town centre opportunities failed to be delivered, there may be a future circumstance where the existing retail parks could capture some of the anticipated growth, rather than lose it to competing centres outside of the catchment.

2.13 Nonetheless, the report cautioned against committing to such a strategy too early and that in the intervening period, town centre opportunities should be fully explored and growth or expansion at existing retail parks should be controlled.

3 DATA INPUTS

3.1 In this section, we set out the data inputs that have been used to inform our update of the retail capacity forecasts set out in the SRSU, as summarised in the previous section. The key data inputs are as follows:

- population forecasts;
- per capita expenditure data;
- expenditure growth rates;
- special forms of trading (such as online shopping);
- turnover efficiency gain in existing retailers;
- retail planning commitments; and
- consideration of over-trading in the convenience retail sector.

3.2 We discuss each of these inputs in turn below. This section should be read alongside the quantitative data tables, which are contained in the appendices to this report.

Population Forecasts

3.3 This update makes use of new baseline (2012-based) population forecasts for each of the six survey zones. In order to calculate the population of these survey zones over the study period to 2026, we have utilised new population forecasts which are ONS based and sourced from Experian. The population in the 2012 base year for the six survey zones is shown in Table 1 of Appendix A.

3.4 The new population forecasts indicate a higher level of population growth than was predicted in the SRSU. The SRSU was based on a predicted population growth of 5.9 per cent between 2011 and 2026 across the study area, whereas this update report is based on a predicted population growth of 6.9 per cent between 2012 and 2026 (an approximate population increase of 12,850 persons). A summary of the population growth at the key study interval years is shown in Table 3.1 below.

Table 3.1 Population Forecasts for Retail Study Update

	2012	2016	2021	2026	Change 2012-26
2014 Update	187,541	191,248	196,157	200,394	+ 12,853

Expenditure Growth Rates

3.5 In order to ascertain the amount of retail floorspace required over the course of the study period, it is necessary to forecast the level at which personal spending on comparison and convenience retail goods will increase over the course of the study period. This is disaggregated between a number of reporting periods: 2012-2016; 2016-2021; and 2021-2026. Given the inherent uncertainty over expenditure growth rates in the longer term, forecasts for the latter timeframes should be treated with caution and be subject to regular review.

3.6 The new expenditure growth rates are sourced from Experian's Retail Planning Briefing Note 11 (RPBN 11, October 2012) and are set out in Table 3.2 below.

Table 3.2 Expenditure Growth Rates for Retail Study Update

Period	Comparison Goods			Convenience Goods		
	New growth rate (per annum)	SRSU growth rate (per annum)	Percentage Point Change from SRSU	New growth rate (per annum)	SRSU growth rate (per annum)	Percentage Point Change from SRSU
2012-2016	2.8%	2.8%	0.0	0.0%	0.5%	-0.5%
2016-2021	2.9%	3.0%	-0.1	0.8%	0.6%	+0.2
2021-2026	2.9%	3.0%	-0.1	0.8%	0.6%	+0.2

3.7 Table 3.2 indicates that in the comparison goods sector growth rates are very similar to those adopted in the SRSU. In the convenience goods sector, growth rates at the beginning of the study period are more negative than previously forecast but are expected to recover by 2016 at a rate that is slightly higher than was anticipated by the SRSU.

Special Forms of Trading

3.8 Special Forms of Trading (SFT) is expenditure which is diverted from traditional retail outlets towards other channels such as online shopping. SFT acts a 'claim' on expenditure which is available to support physical retail outlets, and therefore it is stripped out from the total expenditure pot in order to ensure that the resultant level of residual expenditure is entirely available to support physical retail floorspace development.

3.9 The SRSU applied 'adjusted' figures for SFT that took account of 'store-picked' online transactions, whereby the customer orders a product online, but the transaction is processed by the nearest local branch of the retailer, thereby contributing to the sales performance of that branch. 'Store-picked' online shopping is currently used for two principal purposes:

- convenience goods shopping — the major supermarket retailers Asda, Sainsbury's and Tesco all fulfil online grocery shopping orders via the nearest local large branch of their stores; and
- comparison goods shopping — an increasing number of retailers, including Argos and Currys, offer 'click & collect' services, whereby the product is ordered online and reserved for collection at the nearest local branch convenient to the customer.

3.10 We agree that it is appropriate to apply the adjusted market shares for SFT to our updated assessment and we do this on the basis of figures contained within Experian's RPBN 11. Table 3.3 below summarises the adjusted SFT discounts; the SFT figures used in the SRSU are also shown for reference.

Table 3.3 SFT Discounts

Year	Comparison Goods			Convenience Goods		
	Adjusted SFT discount	SRSU SFT discount	Percentage Point Change from SRSU	Adjusted SFT discount	SRSU SFT discount	Percentage Point Change from SRSU
2012	10.5%	10.0%	+0.5	2.1%	4.2%	-2.1
2016	13.0%	12.7%	+0.3	3.2%	5.9%	-2.7
2021	15.7%	12.4%	+3.3	4.6%	6.3%	-1.7
2026	15.9%	12.1%	+3.8	5.1%	6.8%	-1.7

3.11 It can be seen from Table 3.3 that the adjusted SFT rates for comparison goods have risen since the time of the SRSU but that forecast rates in the convenience goods sector have fallen. The latter reflects a more sophisticated understanding of the relationship between physical retail floorspace and online sales for the main supermarket operators.

3.12 We note here that whilst we have utilised the same type of figures for SFT as applied within the SRSU, we have applied these discounts differently to take account of an element of double counting of SFT that occurred within the SRSU. This is fully explained in Section 4 of our report.

Turnover Efficiency Gain of Existing Floorspace

3.13 It is also necessary to make an allowance for the growth in sales efficiency of existing convenience and comparison goods retailers within the study area, as stores are expected to trade at increasingly efficient levels of turnover per square metre of sales area over the course of the study period. We note that no specific allowance was made for turnover efficiency gain in the SRSU.

3.14 National Planning Practice Guidance does not provide any specific guidance on turnover efficiency gains but the DCLG Practice Guidance that accompanied PPS4 (paragraph B.48) advised that such allowances should be *'realistic'* and that the choice will depend on *the 'capacity of existing floorspace to absorb increased sales'* and should be '*compatible with assumptions about the growth in per capita expenditure'.*

3.15 Allowances for sales density growth are linked to expenditure growth. The level of comparison and convenience sales density growth that we have allowed for in the study area is summarised in Table 3.4. Owing to the low levels of convenience retail expenditure growth presently being forecast by Experian for the short term period, we do not make any allowance for sales density growth until after 2016.

Table 3.4 Rates of Floorspace Efficiency Change

Time Period	Per Annum	
	Comparison Goods	Convenience Goods
2013-2016	1.5%	0.0%
2016+	1.5%	0.3%

3.16 These figures are blanket sales density growth rates for all floorspace in the study area. Inevitably, different types of floorspace have different abilities to absorb expenditure growth, with modern floorspace better equipped than older stock. However, we are aware that the centres within the study area have both modern and older floorspace, and so we consider that such a uniform approach is robust.

Retail Planning Commitments

3.17 It is necessary to make deductions from any initial surplus of expenditure for the 'claim' of existing retail planning commitments. To inform our current work, the Council has provided us with an updated list of commitments.

3.18 The SRSU made allowance for a number of committed comparison and convenience goods developments in the PCA. As no new household survey into shopping patterns has been undertaken to inform this update, is it necessary to continue to treat the commitments from the SRSU as a 'claim' on total available expenditure (we understand, in any case, that none has yet been implemented). The commitments are shown in Table 3.5 (for comparison goods) and Table 3.6 (for convenience goods), alongside new commitments for retail floorspace which have been granted planning permission subsequent to the completion of the SRSU.

3.19 In carrying over commitments contained within the SRSU we have, on the advice of the Council, removed the 'Gap' site at Raven Meadows in Shrewsbury Town Centre which had planning permission for 5,948 sq. m of comparison goods sales area floorspace. However, we understand that the site is now to be developed for a multi-storey car park and so this permission, which dates back to 2006, will not be implemented. We also note that whilst the SRSU only considered commitments within the PCA, this update considers commitments across the study area (albeit that new commitments since 2012 are all within the PCA).

3.20 The tables below show existing commitments from the SRSU, in addition to new permissions which have subsequently been granted. We note that for the purposes of our capacity assessment the turnover figures shown in Tables 3.5 and 3.6 are shown as estimated turnover derived from the catchment area rather than as the total turnover of these developments (see Table 6 of Appendix A for further details). Having made allowance for recent permissions, Table 3.5 shows that the claim arising from extant convenience goods commitments has increased significantly from just £4.14m to £58.00m.

Table 3.5 Committed Convenience Goods Floorspace in PCA (at June 2014)

Scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2014)
Previous Commitments carried over from SRSU		
Waitrose, Pride Hill	259	2.74
Convenience Store, Six Bells Public House	280	1.40
A. Sub-total for previous commitments	**539**	**4.14**
New commitments (retail planning applications approved since 2012)		
Tesco, Battlefield (extension)	733	7.88
Sainsbury's, Meole Brace (extension)	955	9.90
Waitrose, Oteley Road	2,330	23.41
Marks and Spencer, Meole Brace	1,600	12.67
B. Sub-total for new commitments	**5,618**	**53.86**
Total comparison goods commitments (A+B)	**6,157**	**58.00**

3.21 Table 3.5 demonstrates that there have been a number of new foodstores permitted in the PCA following the completion of the SRSU, most significantly the new Waitrose store at Oteley Road. Table 3.6 shows that some 5,618 sq.m of additional convenience sales area floorspace has been permitted following the completion of the previous retail study update. In total there is now 6,157 sq.m of sales area floorspace, or £58.00m in forecast turnover, of committed convenience goods floorspace in the PCA.

3.22 Table 3.6 below shows that the turnover of comparison goods floorspace commitments in the PCA has risen from £18.98m in 2012 (this figure now excluding The Gap site at Raven Meadows) to £124.58m. The amount of committed floorspace has risen from 6,196 sq. m of sales area to 31,920 sq. m of sales area, largely as a result of the approval of the town centre's New Riverside scheme and some other significant developments at Meole Brace Retail Park and Sundorne Retail Park.

Table 3.6 Committed Comparison Goods Floorspace in PCA (at June 2014)

Scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2014)
Previous Commitments carried over from SRSU		
Junction of Barker Street and Claremont Street	271	1.29
Mezzanine, Unit 4 Meole Brace Retail Park	578	3.25
Mezzanine, Unit 8 Meole Brace Retail Park	2,360	6.37
Mezzanine, Building 1 Unit 4, Sundorne Retail Park	454	1.22
Dobbies Garden Centre, Bayston	529	1.43
Implemented Floorspace, Units 1&2 Sundorne Retail Park	2,004	5.41
A. Sub-total for previous commitments	**6,196**	**18.98**
New Commitments (retail planning applications approved since 2012)		
New Riverside Scheme	17,643	74.98
Tesco, Battlefield (extension)	660	6.31
Sainsbury's, Meole Brace (extension)	732	3.84
Waitrose, Oteley Road	390	2.16
Small Units, Waitrose, Oteley Road	342	0.97
Marks and Spencer, Meole Brace	240	1.75
Retail Unit, Meole Brace Retail Park	81	0.36
Extension to Unit 1, Meole Brace Retail Park	2,601	7.02
Mezzanine, Building 1, Sundorne Retail Park	3,035	8.19
B. Sub-total for new commitments	**25,724**	**105.60**
Total convenience goods commitments (A+B)	**31,920**	**124.58**

Over-trading in the Convenience Retail Sector

3.23 The SRSU found that the aggregate level of convenience retail over-trading in the PCA was £38.4m in 2011. That study did not consider over-trading elsewhere in the study area, though we note that the household survey results indicated that over-trading from stores in rural areas beyond the PCA was minimal.

3.24 We have removed a number of the destinations previously considered from our assessment of over-trading. These are 'local shops' within Shrewsbury and the Shrewsbury Market, destinations to which it is very difficult to identify an appropriate benchmark turnover and where any over-trading should not, in our view, be considered as potential expenditure capacity. We have also removed the former Netto store at Abbey Foregate which now trades as Home Bargains.

3.25 Our revised assessment of over-trading, applying the most up-to-date sales density figures for the main foodstore operators that are taken from Verdict's UK Food and Grocery Retailers Report (2013), indicates that convenience retail over-trading within the PCA has risen from the £38.4m identified in 2011 to a current figure of £51.92m. This over-trading mainly arises from four large foodstores; Asda at Old Potts Way, Sainsbury's at Meole Brace Retail Park, Tesco Extra at the Cattle Market, and Morrisons at Whitchurch Street.

4 UPDATED QUANTITATIVE FORECASTS

4.1 Having taken into account the changes to the data inputs described in the previous section, we set out in this section the updated retail capacity forecasts for the study area and the PCA. Our findings should be read in conjunction with the tables contained in Appendix A, which are organised as follows:

- Table 1 sets out population forecasts and per capita spending on convenience retail goods for each of the zones in the study area at the interval years of 2012, 2016, 2021 and 2026. This per capita expenditure includes spending on special forms of trading.
- Table 2 sets out updated total forecasts of expenditure on convenience retail goods, which are calculated from the application of population figures to per capita expenditure figures in Table 1. Table 2a shows the split between main and top-up convenience goods shopping for each of the six zones reflecting the proportions identified within the SRSU.
- Table 3 sets out the market shares of foodstores and destinations in the study area that are taken from the original household survey results. This includes market shares for special forms of trading. Table 4 converts these market shares to turnover figures based on the data in Table 2a.
- Table 5 shows convenience expenditure by SFT for each zone derived from the household survey and projected forward to 2026.
- Table 6 summarises the convenience retail commitments within the study area, including those from the SRSU and schemes granted permission since 2012.
- Table 7 assesses levels of under and over-trading at the principal foodstores within the PCA.
- Table 8 presents a summary of the revised convenience goods retail capacity forecasts for the study area and the PCA based on a constant retention rate over the course of the study period to 2026. The findings of this are discussed in greater detail below.
- Tables 9 repeats the updated population data at Table 1 and shows per capita spending on comparison goods at the interval years. Table 10 sets out total forecasts of expenditure on comparison goods based on the data in Table 9.
- Table 11 shows the aggregated market shares of comparison retail destinations within and outside of the study and converts these to turnover figures based on the data in Table 10. The SRSU did not provide aggregated market shares for comparison goods and these are therefore derived from the total turnover figures presented within that study.
- Table 12 shows convenience expenditure by special forms of trading over the study period and Table 13 summarises comparison retail commitments.
- Table 14 presents a summary of the revised comparison goods retail capacity forecasts for the study area and the PCA with a rising retention rate over the course of the study period. The findings of this are discussed below.

Convenience Goods Capacity Forecasts

4.2 Table 8 shows the revised total overall convenience goods capacity forecast for the study area and the PCA. It is structured as follows:

- Row A summarises the population of the study area at 2012, 2016, 2021 and 2026 (derived from Table 1).
- Row B summarises the total convenience goods expenditure available across the study area at the same interval years (derived from Table 1 with SFT figures deducted from Table 5). We deduct SFT in order to calculate the amount of expenditure that is available to support physical retail floorspace and note that this corrects double counting in the previous study whereby SFT was deducted from expenditure figures but market share was also allocated to SFT (therefore depressing the market shares of existing retail floorspace).
- Rows C and D show the proportion of total convenience retail expenditure available which is retained by centres and stores within the study area. This reflects the retention rate of 82.9 per cent identified by the household survey. Given this relatively high retention rate we do not consider it realistic or appropriate to increase this rate over the study period.
- Row E shows the total turnover of existing centres and stores in 2012 which is grown over the study period to reflect up-to-date forecasts of floorspace efficiency growth.
- Row F shows the turnover of convenience retail commitments which is taken from Table 6 and grown over the study period to reflect floorspace efficiency growth. Commitments are assumed to be implemented at 2016.
- Row G shows growth in SFT at the interval years with figures derived from Table 5.
- Row H shows initial residual convenience retail expenditure which is the sum of retained expenditure less the turnover of existing stores, committed floorspace and growth in special forms of trading.
- Rows I and J then make an allowance for the inflow of convenience goods expenditure from outside of the study area.
- Rows K to N calculate final residual expenditure capacity making allowances for inflow and also (at Row M) an allowance for the over-trading of existing stores within the PCA that is derived from Table 7. An allowance for over-trading is made at 2016 and is then assumed to be eliminated by the implementation of committed convenience retail floorspace.
- Rows O to Q convert the final residual expenditure into floorspace requirements for the study area as a whole. The conversion from residual expenditure to floorspace requirements assumes an average sales density of £10,000 per sq. m which is an average of the convenience goods sales densities of the ten main foodstore operators. This figure is grown over the study period to reflect turnover efficiency growth. Gross floorspace figures at Row Q are calculated on the basis of a gross/net ratio of 65 per cent.

- Rows R to U calculate the floorspace requirements for the PCA on the basis of the share of retained convenience expenditure within the study area accounted for by existing stores within the PCA. This share is then applied to the figures in Row P to calculate net floorspace requirements in the PCA at Row T.

4.3 The overall findings of our updated quantitative assessment of convenience retail floorspace requirements are shown in Table 4.1 below.

Table 4.1 Convenience Goods Floorspace Requirements

Convenience Floorspace Requirement (sq. m net)	2012-16	2016-21	2021-26	Total 2012- 2026
Study Area	-1,505	751	1,434	**680**
Primary Catchment Area	-1,160	578	1,105	**524**

4.4 Overall, there is total convenience goods requirement for 680 sq.m of additional sales area floorspace within the study area (524 sq. m in the PCA) over the plan period to 2026, having made allowance for the current identified over-supply of convenience goods floorspace. This requirement is only expected to arise in the post-2021 period, and there is currently no capacity for additional convenience goods floorspace within the study area. We advise that capacity forecasts should be subject to regular review and be updated throughout the plan period.

Comparison Goods Capacity Forecasts

4.5 Tables 9-14 of Appendix A summarise the quantitative capacity for additional comparison goods floorspace in the study area. Table 14 summarises the capacity for additional comparison goods floorspace, and is structured in the same format as its conveniece goods equivalent (Table 8), as summarised above. However, there are a number of differences in the approach to assessing convenience and comparison goods capacity, which are summarised below.

4.6 Firstly, we do not make an allowance for any over or under-trading of existing comparison goods floorspace. Given the wide range of operators within this sector it is much more difficult to accurately assess the performance of existing comparison goods sales floorspace. Nevertheless, we have examined the sales density of comparison goods floorspace within Shrewsbury Town Centre using floorspace data from the SRSU and our updated calculations of the total comparison goods turnover of the town centre. These data indicate that comparison goods floorspace within the town centre typically achieved a sales density of £4,200 per sq. m in 2012 which we consider to be healthy but not at levels that would indicate over-trading.

4.7 There are also a number of changes to rates of retained expenditure and inflow that we factor into our assessment to reflect the anticipated implementation of the New

Riverside scheme in Shrewsbury Town Centre. As a result of this major new development we expect that the comparison expenditure retention rate within the study area will rise by 2.5 percentage points by 2021 and that inflow of expenditure from outside of the study area will also rise by 2 percentage points. The existing comparison expenditure retention rate of 79.8 per cent (when SFT is excluded) is considered to be healthy. Predicted increases in the retention rate are based on our considered opinion and could only be confirmed by a new household survey once the New Riverside scheme has been implemented.

4.8 We raise the retention rate for the study area as a whole rather than the market shares of existing facilities within the primary catchment area because we would expect the improved offer of Shrewsbury Town Centre to reduce leakage of comparison retail expenditure from the study area to larger destinations such as Telford. Simply raising the market share of facilities within the PCA might imply that the PCA would increase its market share at the expense of other facilities within the wider study area that serve localised catchments. We consider this to be inappropriate given the small amounts of retained comparison expenditure that are directed to these other facilities (12 per cent of retained expenditure as opposed to the PCA's 88 per cent).

4.9 Based on the revised inputs, Table 14 shows that across the study period there is no capacity for additional comparison sales area floorspace between 2012 and 2026. This is mainly due to the claims on capacity presented by committed comparison retail floorspace and particularly the New Riverside scheme in Shrewsbury Town Centre. The requirements for the remainder of the plan period are summarised in Table 4.2 below.

Table 4.2 Comparison Goods Floorspace Requirements

Comparison Floorspace Requirement (sq. m net)	2012-16	2016-21	2021-26	Total 2012- 2026
Study Area	-19,977	5,556	4,944	**-9,477**
Primary Catchment Area	-17,574	4,888	4,349	**-8,337**

4.10 The figures set out at Tables 4.1 and 4.2 summarise the updated requirements for additional comparison and convenience goods floorspace in the study area and the PCA over the plan period to 2026, based on the revised data inputs discussed in Section 3 of this report. The Council should seek to ensure that capacity forecasts are regularly updated throughout the course of the study period, to take account of updated population and spending data, new retail planning commitments and the non-implementation of existing commitments.

5 SUMMARY AND RECOMMENDATIONS

5.1 This report was commissioned by Shropshire Council in May 2014 and seeks to update the quantitative assessment of retail floorspace requirements presented within the Shropshire Retail Study Update (SRSU) of 2012. This new study takes account of the most up-to-date population estimates, retail expenditure forecasts and committed retail developments that have been granted planning permission since the time of the 2012 study, in order to provide the Council with up-to-date evidence to support the preparation of its Site Allocations and Management of Development Plan (SAMdev).

Summary of Findings

5.2 In Section 3 of this report we have set out the revised data inputs that have been used in our updated assessment of quantitative retail floorspace requirements over the development plan period to 2026. These have included the latest population and retail expenditure figures provided by Experian, the most recent estimates of future market shares for special forms of trading (i.e. non-store retail sales), an assessment of over-trading based on the latest operator sales density information from Verdict, and, most significantly, an updated schedule of committed retail floorspace. The latter includes several planning permissions that have been granted since 2012, including a new Waitrose store at Oteley Road, various developments at the Meole Brace and Sundorne Retail Parks, and the major New Riverside retail scheme in Shrewsbury Town Centre.

5.3 Section 4 of this report sets out our methodology for assessing retail floorspace capacity for both convenience and comparison retail goods and presents our findings based on the workings contained at Appendix A. Across the entire study area we find a small requirement for an additional 680 sq. m of convenience goods sales area floorspace across the period to 2026, although we note that this requirement does not arise until after 2021. The equivalent requirement for the Primary Catchment Area (PCA) - which comprises the Shrewsbury urban area - is estimated to be 524 sq. m.

5.4 In terms of comparison goods capacity, we estimate that there is a significant over-supply of floorspace that extends across the entire plan period. Whilst some revised data inputs and assumptions, such as higher population figures and allowances for increased retention and inflow of expenditure, should indicate greater comparison expenditure capacity, this is fully absorbed by the committed floorspace within the study area. The New Riverside scheme in Shrewsbury Town Centre would deliver approximately 17,650 sq. m of additional comparison goods sales area floorspace and, together with other committed schemes, represents a very significant claim on expenditure capacity.

5.5 As a result we estimate that across the study area there is an oversupply of comparison retail floorspace amounting to 9,477 sq. m of sales area florospace in the period 2012-2026. The equivalent figure for the PCA is an oversupply of 8,337 sq. m.

These can be alternatively described as comparison sales floorspace requirements of -9,477 sq. m and -8,337 sq. m respectively.

Recommendations

5.6 The main findings and recommendations of the SRSU are set out in Section 2 of this report. It is apparent from our updated assessment of expenditure capacity that these previous recommendations remain relevant. Indeed, the reduction in floorspace requirements since the time of the SRSU, and particularly the large oversupply of comparison goods sales floorspace, confirm that there is no requirement for the local planning authority to allocate sites outside of Shrewsbury Town Centre in order to satisfy objectively assessed needs and meet its obligations under paragraphs 160 and 182 of the National Planning Policy Framework (NPPF).

5.7 The negative expenditure capacity identified in terms of comparison goods reinforces the importance of protecting the New Riverside scheme in Shrewsbury Town Centre. That development is critical to addressing previously identified qualitative deficiencies in the performance of the town centre and remains the most appropriate means to deliver the objectives of Policy CS15 of the Shropshire Core Strategy.

5.8 We understand that the developer of that scheme has recently confirmed its intention to bring forward the New Riverside development as soon as possible and it is clear that, on the basis of our revised assessment, the site remains available and that the allocation of other sites in out-of-centre locations would dilute investor and operator interest in Shrewsbury Town Centre.

5.9 Even if the delivery of the New Riverside scheme is delayed until later in the plan period, there is a significant amount of other committed comparison retail floorspace and such a delay would not result in positive floorspace requirements before 2026. It is therefore premature to consider the allocation of other sites at this stage, even if the development or expansion of these alternative sites was contingent on the failure to deliver the New Riverside scheme.

5.10 We further note that paragraph 23 of the NPPF states that local planning authorities should allocate a range of sites to meet retail and other development needs '*in town centres'* and that these needs should be met in full. It goes on to state that local planning authorities should undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites. We do not consider that any such assessment is required at this time but were such an assessment to be necessary at a future point it is clear that the Council should give priority to in-centre and edge-of-centre sites before considering out-of-centre sites.

APPENDIX A QUANTITATIVE ASSESSMENT

Table 1: Population and Expenditure (Convenience)

ZONE	Population				PER CAPITA EXPENDITURE CONVENIENCE (£)			
	2012	2016	2021	2026	2012	2016	2021	2026
1. Shrewsbury North	40,617	41,437	42,509	43,439	2,109	2,092	2,177	2,266
2. Shrewsbury East	23,829	24,339	24,931	25,427	2,160	2,143	2,230	2,320
3. Shrewsbury South	23,801	24,246	24,865	25,394	2,104	2,087	2,172	2,260
4. Shrewsbury West	26,395	26,920	27,645	28,272	2,133	2,116	2,202	2,291
5. Shrewsbury Central West	37,695	38,425	39,409	40,259	1,887	1,872	1,948	2,027
6. Shrewsbury Central East	35,204	35,881	36,798	37,603	1,887	1,872	1,948	2,027
Total	**187,541**	**191,248**	**196,157**	**200,394**				

Table 2: Total Expenditure Available (Convenience)

ZONE	CONVENIENCE EXPENDITURE (£m)				GROWTH (£m)		
	2012	2016	2021	2026	'12-'16	'16-'21	'21-'26
1. Shrewsbury North	85.68	86.69	92.55	98.42	1.01	5.86	5.87
2. Shrewsbury East	51.48	52.15	55.59	59.00	0.67	3.44	3.41
3. Shrewsbury South	50.08	50.61	54.01	57.40	0.52	3.40	3.39
4. Shrewsbury West	56.29	56.96	60.87	64.78	0.67	3.91	3.91
5. Shrewsbury Central West	71.14	71.93	76.77	81.61	0.79	4.84	4.84
6. Shrewsbury Central East	66.42	67.17	71.68	76.23	0.74	4.52	4.55
Total	**381.09**	**385.50**	**411.47**	**437.44**	**4.41**	**25.97**	**25.97**

Table 2a: Split of Total Expenditure Available (Convenience) Main / Top-Up

ZONE	EXPENDITURE £m CONVENIENCE (2012)		
	MAIN	TOP-UP	TOTAL
1. Shrewsbury North	71.97	13.71	85.68
2. Shrewsbury East	44.73	6.74	51.48
3. Shrewsbury South	42.02	8.06	50.08
4. Shrewsbury West	48.97	7.32	56.29
5. Shrewsbury Central West	60.40	10.74	71.14
6. Shrewsbury Central East	57.72	8.70	66.42
TOTAL	**325.81**	**55.28**	**381.09**

Table 3: Shopping Patterns (Convenience)

DESTINATION	TOTAL		1. Shrewsbury North		2. Shrewsbury East		3. Shrewsbury South		4. Shrewsbury West		5. Shrewsbury Central West		6. Shrewsbury Central East	
	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP
WITHIN STUDY AREA														
1. Shrewsbury North														
Lidl, Towers Lawn, Market Drayton	0.3%	1.4%	1.4%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Bomere Heath	0.0%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Clive	0.0%	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Hinstock	0.0%	0.6%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Market Drayton	0.1%	2.6%	0.5%	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Local Shops, Wem	0.1%	0.9%	0.5%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Prees	0.0%	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Market, Market Drayton	0.0%	0.6%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Market, Wem	0.0%	0.4%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Netto, Stafford Street, Market Drayton	0.6%	0.3%	2.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WM Morrisons, Maer Lane, Market Drayton	7.1%	3.3%	32.2%	14.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Morris Central Shopping Park, Wem	0.8%	3.0%	3.8%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op Food, Shrewsbury Road, Bomere Heath	0.0%	0.9%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Cheshire Street, Market Drayton	0.4%	1.6%	1.9%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	9.4%	16.3%	43.1%	71.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
2. Shrewsbury East														
Local Shops, Much Wenlock	0.3%	2.9%	0.0%	0.0%	2.4%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, High Ercall	0.0%	0.3%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Shawbury	0.0%	1.0%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op Food, Market Drayton Road, Shawbury	0.0%	1.0%	0.0%	0.0%	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Sub-Total	0.3%	5.2%	0.0%	0.0%	2.4%	43.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
3. Shrewsbury South														
Spar, Landsown Road, Shrewsbury	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.5%	0.0%	0.0%	0.8%
Co-op, High Street, Church Stretton	1.5%	2.6%	0.0%	0.0%	0.0%	0.0%	11.4%	18.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.8%
Harry Tuffins, Craven Centre, Craven Arms	0.9%	1.3%	0.0%	0.0%	0.0%	0.0%	4.1%	4.5%	3.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Local Shops, Aston Munslow	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Bayston Hill	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Church Stretton	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.6%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Craven Arms	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Ludlow	0.2%	0.9%	0.0%	0.0%	0.0%	0.0%	1.6%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Market, Church Stretton	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Market, Ludlow	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Station Drive, Ludlow	2.3%	0.6%	0.0%	0.0%	0.0%	0.0%	17.9%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	5.2%	9.5%	0.0%	0.0%	0.0%	0.0%	36.6%	64.0%	3.0%	6.8%	0.5%	0.0%	0.0%	1.6%
4. Shrewsbury West														
Co-op, Church Street, Bishops Castle	0.3%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	7.7%	0.0%	0.0%	0.0%	0.0%
Local Shops, Baschurch	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%
Local Shops, Bishops Castle	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	4.8%	0.0%	0.0%	0.0%	0.0%
Local Shops, Hanwood	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Kinnerley	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%
Local Shops, Knockin	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Ministerley	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%
Local Shops, Montford Bridge	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Pontesbury	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Local Shops, Westbury	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.5%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	34.7%	0.0%	0.0%	0.0%	0.0%
5. Shrewsbury Central West														
Asda, Old Potts Way, Shrewsbury	8.1%	5.9%	0.5%	0.0%	0.8%	1.3%	4.1%	3.4%	10.6%	1.9%	19.1%	11.3%	11.5%	15.7%
Co-op Food, Bank Farm Road, Radbrook Green	0.4%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	2.2%	9.9%	0.0%	0.8%
Co-op Food, Bicton Heath Shopping Centre, Bicton Heath	0.3%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	6.7%	1.1%	8.5%	0.0%	0.0%
Co-op Food, Mytton Oak Road, Copthorne	0.3%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.9%	1.1%	4.3%	0.0%	0.8%
Local Shops, Shrewsbury	0.2%	8.1%	0.0%	1.3%	0.8%	1.3%	0.0%	4.5%	0.0%	9.6%	0.5%	12.1%	0.0%	18.2%
Market, Shrewsbury	0.4%	1.3%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	5.0%	0.0%	0.8%
Marks & Spencer, Castle Street, Shrewsbury	1.0%	2.9%	0.0%	0.6%	0.0%	0.0%	0.0%	1.1%	0.8%	0.0%	4.4%	8.5%	0.5%	5.0%
Sainsbury's Local, Whitecroft Road, Shrewsbury	1.8%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	1.5%	0.0%	6.0%	7.1%	2.2%	0.8%
Sainsbury's, Meole Brace Retail Park, Shrewsbury	17.4%	6.9%	1.4%	0.6%	8.0%	6.3%	35.0%	15.7%	21.2%	9.6%	32.2%	8.5%	12.6%	5.0%
Somerfield, Riverside Shopping Centre, Shrewsbury	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.7%	1.1%	0.0%
Spar, New Park Street, Shrewsbury	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Sub-Total	30.3%	33.5%	1.9%	3.1%	9.6%	8.9%	39.1%	25.8%	35.7%	31.6%	69.9%	76.6%	27.9%	47.1%
6. Shrewsbury Central East														
Aldi, Arlington Way, Shrewsbury	1.4%	0.3%	0.9%	0.6%	1.6%	1.3%	2.4%	0.0%	3.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Co-op Food, Mount Pleasant Road, Heath Farm	0.0%	0.6%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	1.7%
Co-op Food, Sutton Farm Shopping Centre, Shrewsbury	0.2%	3.3%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.8%	2.9%	0.5%	9.9%	0.0%	4.1%
Iceland, Lancaster Retail Park, Shrewsbury	0.4%	0.9%	0.5%	0.6%	0.0%	1.3%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	1.1%	3.3%
Lidl, Harlescott Lane, Shrewsbury	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	1.7%
Netto, Abbey Foregate, Shrewsbury	0.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.1%	0.8%	0.0%	0.5%	1.4%	1.1%	3.3%
Spar, Conway Drive Telford Estate, Shrewsbury	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
Tesco Express, Ditherington Road, Shrewsbury	2.3%	1.4%	1.9%	0.0%	0.8%	0.0%	0.8%	0.0%	4.5%	1.0%	1.1%	3.5%	4.4%	3.3%
Tesco Extra, Cattle Market, Shrewsbury	12.8%	4.3%	15.6%	1.3%	20.0%	6.3%	2.4%	0.0%	9.8%	2.9%	6.6%	2.8%	19.8%	13.2%
WM Morrisons, Whitchurch Street, Shrewsbury	15.4%	4.2%	5.7%	0.0%	5.6%	1.3%	9.8%	0.0%	11.4%	2.9%	16.9%	2.1%	38.5%	18.2%
Sub-Total	33.4%	16.6%	24.6%	3.7%	28.0%	10.2%	16.2%	1.1%	31.1%	10.7%	25.6%	19.7%	68.2%	50.5%
SUB-TOTAL STUDY AREA (%)	**79%**	**86%**	**70%**	**79%**	**40%**	**63%**	**92%**	**91%**	**74%**	**84%**	**96%**	**98%**	**96%**	**99%**

DESTINATION	TOTAL		1. Shrewsbury North		2. Shrewsbury East		3. Shrewsbury South		4. Shrewsbury West		5. Shrewsbury Central West		6. Shrewsbury Central East	
	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP
OUTSIDE STUDY AREA														
Powys County Council														
WM Morrisons, Berriew Street, Welshpool	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Shropshire Council														
Aldi, Beatrice Street, Oswestry	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Station Drive, Ludlow	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	2.4%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Upper Galdeford, Ludlow	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Brownlow Street, Whitchurch	0.2%	0.1%	0.9%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Bridgewater Street, Whitchurch	0.4%	0.7%	1.9%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Bridgnorth	0.0%	0.4%	0.0%	0.0%	0.0%	2.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Ellesmere	0.0%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Oswestry	0.2%	0.9%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	1.5%	4.8%	0.0%	0.0%	0.0%	0.0%
Local Shops, Whitchurch	0.0%	0.9%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Market, Oswestry	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Sainsbury's, Black Gate Street, Oswestry	1.3%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	5.8%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Whitburn Street, Bridgnorth	0.2%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Canal Way, Ellesmere	0.2%	0.4%	0.9%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, White Lion Meadow, Whitchurch	3.0%	2.0%	13.7%	9.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WM Morrisons, Station Road, Oswestry	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	1.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	6.5%	7.2%	17.4%	18.5%	1.6%	3.8%	3.2%	5.5%	15.2%	12.6%	0.0%	0.7%	0.0%	0.0%
Telford & Wrekin Borough Council														
Aldi, Grooms Alley, Wellington	0.1%	0.1%	0.0%	0.0%	0.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, St Georges Road, Telford	0.5%	0.1%	0.9%	0.0%	1.6%	1.3%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, The Border, Telford	0.5%	1.0%	0.0%	0.6%	3.2%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.8%
Co-op Food, Roden Close, Dot Hill	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Iceland, New Street,Wellington	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Donnington	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Telford	0.0%	0.3%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Wellington	0.0%	0.3%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks & Spencer, Dean Street, Telford	0.0%	0.3%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Sainsbury's, Telford Forge Retail Park, Telford	1.0%	0.4%	0.5%	0.0%	7.2%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Haygate Road, Telford	0.2%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Wrekin Retail Park, Telford	2.4%	0.3%	1.9%	0.0%	14.4%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Waitrose, Audley Road, Newport	0.7%	0.3%	1.9%	1.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
WM Morrisons, Spring Hill, Wellington	3.5%	1.3%	0.5%	0.0%	25.6%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	9.0%	4.8%	5.7%	1.9%	56.8%	32.8%	0.0%	2.2%	0.8%	0.0%	0.5%	1.4%	1.0%	0.8%
Tewkesbury Borough Council														
Local Shops, Ashchurch	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Wrexham County Borough Council														
Asda, Holt Road, Wrexham	0.3%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Wrexham	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	0.3%	0.1%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Other														
Other	0.6%	0.4%	1.4%	0.6%	0.0%	1.3%	1.6%	1.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	0.6%	0.4%	1.4%	0.6%	0.0%	1.3%	1.6%	1.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
SUB-TOTAL	16.6%	12.6%	25.9%	21.0%	58.4%	37.9%	4.8%	8.8%	18.3%	14.6%	0.5%	2.1%	1.0%	0.8%
Internet / home delivery	3.9%	0.3%	4.3%	0.0%	1.6%	0.0%	3.3%	0.0%	8.3%	1.9%	3.3%	0.0%	2.7%	0.0%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Table 4: Shopping Patterns (Convenience)

DESTINATION	Grand Total	TOTAL		1. Shrewsbury North		2. Shrewsbury East		3. Shrewsbury South		4. Shrewsbury West		5. Shrewsbury Central West		6. Shrewsbury Central East	
		MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP	MAIN FOOD	TOP UP
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
WITHIN STUDY AREA															
1. Shrewsbury North															
Lidl, Towers Lawn, Market Drayton	**1.75**	**0.98**	**0.77**	1.01	0.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Bomere Heath	**0.06**	**0.00**	**0.06**	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Clive	**0.17**	**0.00**	**0.17**	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Hinstock	**0.33**	**0.00**	**0.33**	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Market Drayton	**1.76**	**0.33**	**1.44**	0.36	1.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Local Shops, Wem	**0.82**	**0.33**	**0.50**	0.36	0.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Prees	**0.17**	**0.00**	**0.17**	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Market, Market Drayton	**0.33**	**0.00**	**0.33**	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Market, Wem	**0.22**	**0.00**	**0.22**	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Netto, Stafford Street, Market Drayton	**2.12**	**1.95**	**0.17**	2.02	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WM Morrisons, Maer Lane, Market Drayton	**24.96**	**23.13**	**1.82**	23.17	2.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Morris Central Shopping Park, Wem	**4.26**	**2.61**	**1.66**	2.73	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op Food, Shrewsbury Road, Bomere Heath	**0.50**	**0.00**	**0.50**	0.00	0.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Iceland, Cheshire Street, Market Drayton	**2.19**	**1.30**	**0.88**	1.37	0.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total	**39.64**	**30.63**	**9.01**	31.02	9.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
2. Shrewsbury East															
Local Shops, Much Wenlock	**2.58**	**0.98**	**1.60**	0.00	0.00	1.07	1.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, High Ercall	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Shawbury	**0.55**	**0.00**	**0.55**	0.00	0.00	0.00	0.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op Food, Market Drayton Road, Shawbury	**0.55**	**0.00**	**0.55**	0.00	0.00	0.00	0.51	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Sub-Total	**3.85**	**0.98**	**2.87**	**0.00**	**0.00**	**1.07**	**2.95**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.08**	**0.00**	**0.00**
3. Shrewsbury South															
Spar, Landsown Road, Shrewsbury	**0.66**	**0.33**	**0.33**	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.00	0.30	0.00	0.00	0.07
Co-op, High Street, Church Stretton	**6.32**	**4.89**	**1.44**	0.00	0.00	0.00	0.00	4.79	1.45	0.00	0.07	0.00	0.00	0.00	0.07
Harry Tuffins, Craven Centre, Craven Arms	**3.65**	**2.93**	**0.72**	0.00	0.00	0.00	0.00	1.72	0.36	1.47	0.35	0.00	0.00	0.00	0.00
Local Shops, Aston Munslow	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Bayston Hill	**0.33**	**0.00**	**0.33**	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Church Stretton	**1.11**	**0.00**	**1.11**	0.00	0.00	0.00	0.00	0.00	1.18	0.00	0.07	0.00	0.00	0.00	0.00
Local Shops, Craven Arms	**0.66**	**0.33**	**0.33**	0.00	0.00	0.00	0.00	0.34	0.36	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Ludlow	**1.15**	**0.65**	**0.50**	0.00	0.00	0.00	0.00	0.67	0.54	0.00	0.00	0.00	0.00	0.00	0.00
Market, Church Stretton	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00
Market, Ludlow	**0.38**	**0.33**	**0.06**	0.00	0.00	0.00	0.00	0.34	0.09	0.00	0.00	0.00	0.00	0.00	0.00
Tesco, Station Drive, Ludlow	**7.83**	**7.49**	**0.33**	0.00	0.00	0.00	0.00	7.52	0.36	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total	**22.19**	**16.94**	**5.25**	**0.00**	**0.00**	**0.00**	**0.00**	**15.38**	**5.16**	**1.47**	**0.50**	**0.30**	**0.00**	**0.00**	**0.14**
4. Shrewsbury West															
Co-op, Church Street, Bishops Castle	**1.64**	**0.98**	**0.66**	0.00	0.00	0.00	0.00	0.00	0.00	1.13	0.56	0.00	0.00	0.00	0.00
Local Shops, Baschurch	**0.33**	**0.00**	**0.33**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.00	0.00	0.00
Local Shops, Bishops Castle	**1.04**	**0.65**	**0.39**	0.00	0.00	0.00	0.00	0.00	0.00	0.73	0.35	0.00	0.00	0.00	0.00
Local Shops, Hanwood	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Local Shops, Kinnerley	**0.22**	**0.00**	**0.22**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00
Local Shops, Knockin	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Local Shops, Ministerley	**0.55**	**0.00**	**0.55**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.00
Local Shops, Montford Bridge	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Local Shops, Pontesbury	**0.39**	**0.00**	**0.39**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35	0.00	0.00	0.00	0.00
Local Shops, Westbury	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Sub-Total	**4.39**	**1.63**	**2.76**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.86**	**2.54**	**0.00**	**0.00**	**0.00**	**0.00**
5. Shrewsbury Central West															
Asda, Old Potts Way, Shrewsbury	**29.65**	**26.39**	**3.26**	0.36	0.00	0.36	0.09	1.72	0.27	5.19	0.14	11.54	1.21	6.64	1.37
Co-op Food, Bank Farm Road, Radbrook Green	**2.69**	**1.30**	**1.38**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	1.33	1.06	0.00	0.07
Co-op Food, Bicton Heath Shopping Centre, Bicton Heath	**2.47**	**0.98**	**1.49**	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.49	0.66	0.91	0.00	0.00
Co-op Food, Mytton Oak Road, Copthorne	**1.70**	**0.98**	**0.72**	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.14	0.66	0.46	0.00	0.07
Local Shops, Shrewsbury	**5.13**	**0.65**	**4.48**	0.00	0.18	0.36	0.09	0.00	0.36	0.00	0.70	0.30	1.30	0.00	1.58
Market, Shrewsbury	**2.02**	**1.30**	**0.72**	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	1.33	0.54	0.00	0.07
Marks & Spencer, Castle Street, Shrewsbury	**4.86**	**3.26**	**1.60**	0.00	0.08	0.00	0.00	0.00	0.09	0.39	0.00	2.66	0.91	0.29	0.44
Sainsbury's Local, Whitecroft Road, Shrewsbury	**6.80**	**5.86**	**0.94**	0.00	0.00	0.00	0.00	0.00	0.09	0.73	0.00	3.62	0.76	1.27	0.07
Sainsbury's, Meole Brace Retail Park, Shrewsbury	**60.51**	**56.69**	**3.81**	1.01	0.08	3.58	0.42	14.71	1.27	10.38	0.70	19.45	0.91	7.27	0.44
Somerfield, Riverside Shopping Centre, Shrewsbury	**1.36**	**1.30**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.08	0.63	0.00
Spar, New Park Street, Shrewsbury	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Sub-Total	**117.24**	**98.72**	**18.52**	**1.37**	**0.42**	**4.29**	**0.60**	**16.43**	**2.08**	**17.48**	**2.31**	**42.22**	**8.23**	**16.10**	**4.10**
6. Shrewsbury Central East															
Aldi, Arlington Way, Shrewsbury	**4.73**	**4.56**	**0.17**	0.65	0.08	0.72	0.09	1.01	0.00	1.47	0.00	0.00	0.00	0.63	0.00
Co-op Food, Mount Pleasant Road, Heath Farm	**0.33**	**0.00**	**0.33**	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.15
Co-op Food, Sutton Farm Shopping Centre, Shrewsbury	**2.48**	**0.65**	**1.82**	0.00	0.08	0.00	0.00	0.00	0.00	0.39	0.21	0.30	1.06	0.00	0.36
Iceland, Lancaster Retail Park, Shrewsbury	**1.80**	**1.30**	**0.50**	0.36	0.08	0.00	0.09	0.00	0.00	0.39	0.00	0.00	0.00	0.63	0.29
Lidl, Harlescott Lane, Shrewsbury	**1.47**	**1.30**	**0.17**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.15
Netto, Abbey Foregate, Shrewsbury	**2.18**	**1.63**	**0.55**	0.00	0.00	0.00	0.00	0.34	0.09	0.39	0.00	0.30	0.15	0.63	0.29
Spar, Conway Drive Telford Estate, Shrewsbury	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15
Tesco Express, Ditherington Road, Shrewsbury	**8.27**	**7.49**	**0.77**	1.37	0.00	0.36	0.00	0.34	0.00	2.20	0.07	0.66	0.38	2.54	0.29
Tesco Extra, Cattle Market, Shrewsbury	**44.08**	**41.70**	**2.38**	11.23	0.18	8.95	0.42	1.01	0.00	4.80	0.21	3.99	0.30	11.43	1.15
WM Morrisons, Whitchurch Street, Shrewsbury	**52.50**	**50.18**	**2.32**	4.10	0.00	2.51	0.09	4.12	0.00	5.58	0.21	10.21	0.23	22.22	1.58
Sub-Total	**118.00**	**108.82**	**9.18**	**17.70**	**0.51**	**12.53**	**0.69**	**6.81**	**0.09**	**15.23**	**0.78**	**15.46**	**2.12**	**39.37**	**4.39**
SUB-TOTAL STUDY AREA	**305.31**	**257.72**	**47.59**	**50.09**	**10.77**	**17.89**	**4.24**	**38.61**	**7.33**	**36.04**	**6.13**	**57.98**	**10.50**	**55.47**	**8.63**

OUTSIDE STUDY AREA															
Powys County Council															
WM Morrisons, Berriew Street, Welshpool	**0.65**	**0.65**	**0.00**	0.00	0.00	0.00	0.00	0.00	0.00	0.73	0.00	0.00	0.00	0.00	0.00
Sub-Total	**0.65**	**0.65**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.73**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Shropshire Council															
Aldi, Beatrice Street, Oswestry	**0.65**	**0.65**	**0.00**	0.00	0.00	0.00	0.00	0.34	0.00	0.39	0.00	0.00	0.00	0.00	0.00
Aldi, Station Drive, Ludlow	**1.14**	**0.98**	**0.17**	0.00	0.00	0.00	0.00	1.01	0.18	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Upper Galdeford, Ludlow	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00
Iceland, Brownlow Street, Whitchurch	**0.71**	**0.65**	**0.06**	0.65	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lidl, Bridgewater Street, Whitchurch	**1.69**	**1.30**	**0.39**	1.37	0.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Bridgnorth	**0.22**	**0.00**	**0.22**	0.00	0.00	0.00	0.17	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Ellesmere	**0.06**	**0.00**	**0.06**	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Oswestry	**1.15**	**0.65**	**0.50**	0.00	0.00	0.00	0.09	0.00	0.00	0.73	0.35	0.00	0.00	0.00	0.00
Local Shops, Whitchurch	**0.50**	**0.00**	**0.50**	0.00	0.44	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Market, Oswestry	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Sainsbury's, Black Gate Street, Oswestry	**4.73**	**4.24**	**0.50**	0.00	0.00	0.00	0.00	0.00	0.00	4.46	0.42	0.00	0.00	0.00	0.00
Sainsbury's, Whitburn Street, Bridgnorth	**0.65**	**0.65**	**0.00**	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco, Canal Way, Ellesmere	**0.87**	**0.65**	**0.22**	0.65	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco, White Lion Meadow, Whitchurch	**10.88**	**9.77**	**1.11**	9.86	1.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WM Morrisons, Station Road, Oswestry	**1.68**	**1.63**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	1.86	0.07	0.00	0.00	0.00	0.00
Sub-Total	**25.16**	**21.18**	**3.98**	**12.52**	**2.54**	**0.72**	**0.26**	**1.34**	**0.44**	**7.44**	**0.92**	**0.00**	**0.08**	**0.00**	**0.00**
Telford & Wrekin Borough Council															
Aldi, Grooms Alley, Wellington	**0.38**	**0.33**	**0.06**	0.00	0.00	0.36	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda, St Georges Road, Telford	**1.68**	**1.63**	**0.06**	0.65	0.00	0.72	0.09	0.00	0.00	0.39	0.00	0.00	0.00	0.00	0.00
Asda, The Border, Telford	**2.18**	**1.63**	**0.55**	0.00	0.08	1.43	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.07
Co-op Food, Roden Close, Dot Hill	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Iceland, New Street,Wellington	**0.33**	**0.33**	**0.00**	0.00	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Donnington	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Telford	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Wellington	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marks & Spencer, Dean Street, Telford	**0.17**	**0.00**	**0.17**	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00
Sainsbury's, Telford Forge Retail Park, Telford	**3.48**	**3.26**	**0.22**	0.36	0.00	3.22	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Haygate Road, Telford	**0.65**	**0.65**	**0.00**	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Extra, Wrekin Retail Park, Telford	**7.99**	**7.82**	**0.17**	1.37	0.00	6.44	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00
Waitrose, Audley Road, Newport	**2.45**	**2.28**	**0.17**	1.37	0.18	0.72	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.00
WM Morrisons, Spring Hill, Wellington	**12.12**	**11.40**	**0.72**	0.36	0.00	11.45	0.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total	**31.98**	**29.32**	**2.65**	**4.10**	**0.26**	**25.41**	**2.21**	**0.00**	**0.18**	**0.39**	**0.00**	**0.30**	**0.15**	**0.58**	**0.07**
Tewkesbury Borough Council															
Local Shops, Ashchurch	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Sub-Total	**0.06**	**0.00**	**0.06**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**0.00**	**0.00**	**0.00**
Wrexham County Borough Council															
Asda, Holt Road, Wrexham	**0.98**	**0.98**	**0.00**	1.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Local Shops, Wrexham	**0.06**	**0.00**	**0.06**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00
Sub-Total	**1.03**	**0.98**	**0.06**	**1.01**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.07**	**0.00**	**0.00**	**0.00**	**0.00**
Other															
Other	**2.18**	**1.95**	**0.22**	1.01	0.08	0.00	0.09	0.67	0.09	0.39	0.00	0.00	0.00	0.00	0.00
Sub-total	**2.18**	**1.95**	**0.22**	**1.01**	**0.08**	**0.00**	**0.09**	**0.67**	**0.09**	**0.39**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
SUB-TOTAL	**61.05**	**54.09**	**6.96**	**18.64**	**2.88**	**26.13**	**2.56**	**2.02**	**0.71**	**8.96**	**1.07**	**0.30**	**0.23**	**0.58**	**0.07**
Internet / home delivery	**12.87**	**12.71**	**0.17**	**3.09**	**0.00**	**0.72**	**0.00**	**1.39**	**0.00**	**4.06**	**0.14**	**1.99**	**0.00**	**1.56**	**0.00**
TOTAL	**379.23**	**324.51**	**54.72**	**71.83**	**13.65**	**44.73**	**6.80**	**42.02**	**8.04**	**49.07**	**7.34**	**60.28**	**10.72**	**57.60**	**8.70**

Table 5: Special Forms of Trading (Convenience)

	Zone						
Year	**1**	**2**	**3**	**4**	**5**	**6**	**Total (£)**
2012	3.09	0.72	1.39	4.20	1.99	1.56	**12.95**
2016	4.72	1.09	2.11	6.41	3.04	2.37	**19.74**
2021	6.78	1.57	3.04	9.21	4.37	3.41	**28.37**
2026	7.52	1.74	3.37	10.21	4.84	3.78	**31.46**

SFT Growth (£m)	
2012-2016	6.78
2016-2021	8.63
2021-2026	3.08

Table 6: Planning Commitments (Convenience)

	Application Ref	Gross Floorspace	Net floorspace	Turnover per sq.m	Total turnover	Turnover from Study Area	Total turnover
		sq.m	sq.m	£	£m	%	£m
Waitrose, Pride Hill		490	259	11113	2.88	95%	2.74
Demolition of Six Bells public house and erection of convenience store	11/01614/FUL	460	280	5000	1.40	100%	1.40
Tesco, Battlefield (extension)	11/03609/FUL	1919	733	11942	8.75	90%	7.88
Sainsburys, Meole Brace (extension)	10/04061/FUL	2437	955	11520	11.00	90%	9.90
Waitrose, Otley Road	12/01946/FUL	3902	2330	11163	26.01	90%	23.41
Marks and Spencer, Meole Brace Retail Park (current Blockbuster/Carphone Warehouse unit)	13/01592/OUT	2000	1600	8802	14.08	90%	12.67
Total			**6157**		**64.13**		**58.00**

Table 7: Benchmark Turnover of Existing Convenience Goods Provision Within Zones 5 and 6 (PCA)

	Gross Floorspace (SQ. M)	Net Floorspace (SQ. M)	Convenience Goods Sales Area (%)	Net Convenience (SQ. M)	Benchmark Turnover Per Sq. M (£)	Benchmark Turnover (£m)	Turnover Derived from Study Area (%)	Turnover Derived from Study Area (£m)	Survey Derived Turnover	Overtrading/ Undertrading
5. Shrewsbury Central West										
Asda, Old Potts Way, Shrewsbury	4400	2582	59	1523	12950	19.72	90%	17.75	29.65	11.90
Co-op Food, Bank Farm Road, Radbrook Green	1022	743	86	639	6476	4.14	95%	3.93	2.69	-1.25
Co-op Food, Bicton Heath Shopping Centre, Bicton Heath	Unknown	929	86	799	6476	5.17	95%	4.92	2.47	-2.45
Co-op Food, Mytton Oak Road, Copthorne	636	497	86	427	6476	2.77	95%	2.63	1.70	-0.93
Marks & Spencer, Castle Street, Shrewsbury	8169	1082	95	1028	11261	11.58	90%	10.42	4.86	-5.56
Sainsbury's Local, Whitecroft Road, Shrewsbury	623	407	74	301	13704	4.12	95%	3.92	6.80	2.89
Sainsbury's, Meole Brace Retail Park, Shrewsbury	6709	5124	74	3858	13704	52.87	90%	47.58	60.51	12.92
Co-op (Somerfield at time of Survey), Riverside Shopping Centre, Shrewsbury	1250	776	86	667	6476	4.32	95%	4.10	1.36	-2.74
Spar, New Park Street, Shrewsbury	176	132	95	125	5000	0.63	95%	0.59	0.06	-0.54
6. Shrewsbury Central East										
Aldi, Arlington Way, Shrewsbury	Unknown	808	69	558	11200	6.25	95%	5.94	4.73	-1.21
Co-op Food, Mount Pleasant Road, Heath Farm	143	107	86	92	6476	0.60	95%	0.57	0.33	-0.23
Co-op Food, Sutton Farm Shopping Centre, Shrewsbury	529	397	86	341	6476	2.21	95%	2.10	2.48	0.38
Iceland, Lancaster Retail Park, Shrewsbury	Unknown	475	98	466	7395	3.45	95%	3.27	1.80	-1.47
Lidl, Harlescott Lane, Shrewsbury	1475	1033	79	816	3469	2.83	95%	2.69	1.47	-1.22
Spar, Conway Drive Telford Estate, Shrewsbury	356	267	95	254	5000	1.27	95%	1.21	0.17	-1.04
Tesco Express, Ditherington Road, Shrewsbury	286	169	66	112	11520	1.29	95%	1.23	8.27	7.04
Tesco Extra, Cattle Market, Shrewsbury	8189	4771	66	3149	11520	36.28	90%	32.65	44.08	11.43
WM Morrisons, Whitchurch Street, Shrewsbury	6581	3099	79	2488	12727	31.66	90%	28.50	52.50	24.00
TOTAL		**23398**	**1465**	**17643**		**191.15**		**173.99**		**51.92**

Table 8: Capacity (Convenience)

		2012	2016	2021	2026		Incremental Growth 2012-2016	2016-2021	2021-2026	2012-2026
	Total population and expenditure									
A	Total Population	187,541	191,248	196,157	200,394		3,707	4,909	4,237	12,853
B	Total Expenditure £m	368.14	365.76	383.09	405.98		-2.37	17.33	22.89	37.84
C	Retained Expenditure %	82.9%	82.9%	82.9%	82.9%					
D	Retained Expenditure £m	305.3	303.3	317.7	336.7		-1.97	14.37	18.98	31.38
	Turnover of Convenience Stores in Study Area Drawn from Study Area									
E	Total Convenience Retail Turnover of Stores £m	305.3	305.3	309.9	319.3		0.00	4.61	9.42	14.0
	Commitments									
F	Convenience Retail Commitments £m	0.00	58.17	58.87	59.76		58.17	0.70	0.89	59.76
	Special Forms of Trading									
G	Growth in SFT	0.00	6.78	8.63	3.08		6.78	8.63	3.08	18.50
H	**Initial Residual Convenience Retail Expenditure £m**	**0.00**	**-66.92**	**-59.71**	**-45.49**		**-66.92**	**7.22**	**14.22**	**-45.49**
	Inflow of Expenditure from Outside the Catchment Area									
I	Inflow (%)	2.5%	2.5%	2.5%	2.5%					
J	Inflow £m	7.63	7.58	7.94	8.42		-0.05	0.36	0.47	
	SUMMARY									
K	Initial Residual Convenience Retail Expenditure £m						-66.92	7.22	14.22	-45.49
L	Growth in Inflow £m						-0.05	0.36	0.47	
M	Allowance for current stores over-trading						51.92	0.00	0.00	
N	**FINAL RESIDUAL CONVENIENCE RETAIL EXPENDITURE £m**						**-15.05**	**7.57**	**14.69**	**-45.49**
	Conversion to floorspace need									
O	Turnover per sq m (assumed)						10,000	10,090	10,243	
P	*Floorspace Requirement for study area (sq.m net)*						**-1,505**	**751**	**1,434**	**680**
Q	Floorspace Requirement for study area (sq.m gross)						-2,316	1,155	2,207	1,046
	Floorspace Requirements for PCA									
R	Turnover of Existing Convenience Facilities	235.24	281.81	295.17	312.80					
S	Proportion of Study Area Expenditure %	77.0%	77.0%	77.0%	77.0%					
T	*Floorspace Requirement for PCA (sq. m net)*						**-1,160**	**578**	**1,105**	**524**
U	Floorspace Requirement for PCA (sq. m net)						-1,784	890	1,700	806

Table 9: Population and Expenditure (Comparison)

ZONE	Population				Per Capita Expenditure			
	2012	2016	2020	2026	2012	2016	2020	2026
1. Shrewsbury North	40617	41437	42509	43439	2,839	3,174	3,558	4,224
2. Shrewsbury East	23829	24339	24931	25427	3,073	3,435	3,851	4,572
3. Shrewsbury South	23801	24246	24865	25394	2,799	3,129	3,508	4,164
4. Shrewsbury West	26395	26920	27645	28272	2,858	3,195	3,582	4,252
5. Shrewsbury Central West	37695	38425	39409	40259	2,641	2,952	3,310	3,929
6. Shrewsbury Central East	35204	35881	36798	37603	2,648	2,960	3,319	3,940
Total	**187541**	**191248**	**196157**	**200394**				

Table 10: Total Expenditure Available (Comparison)

ZONE	Total Expenditure				GROWTH COMPARISON £m		
	2012	2016	2021	2026	'12-'16	'16-'21	'21-'26
1. Shrewsbury North	115.31	131.50	151.25	183.48	16.19	19.75	32.23
2. Shrewsbury East	73.23	83.61	96.02	116.25	10.38	12.41	20.23
3. Shrewsbury South	66.62	75.86	87.22	105.75	9.24	11.36	18.52
4. Shrewsbury West	75.44	86.00	99.02	120.21	10.57	13.02	21.19
5. Shrewsbury Central West	99.55	113.44	130.44	158.19	13.89	17.00	27.75
6. Shrewsbury Central East	93.22	106.21	122.12	148.14	12.99	15.91	26.02
Total	**523.37**	**596.63**	**686.07**	**832.02**	**73.26**	**89.44**	**145.95**

Table 11 Shopping Patterns (Comparison)

ZONE	Comparison Market Share	Total Turnover (2012) £m
1. Shrewsbury North		
Country Garden Plant Centre, Black Birches, Shrewsbury	0.02%	0.08
Heathwood Nurseries, Higher Heath, Whitchurch	0.02%	0.09
Holly Farm Nurseries, Whitchurch Road, Whitchurch	0.09%	0.47
Homebase, N4 Axis Centre, Market Drayton	0.29%	1.51
Market Drayton	3.32%	17.35
Wem	1.07%	5.62
Sub-Total	**4.80%**	**25.12**
2. Shrewsbury East		
Claire Austin Plant Centre & Garden Shop,Edgebolton, Shrewsbury	0.00%	0.02
Harley Nursery & Plant Centre, Harley, Shrewsbury	0.01%	0.03
Much Wenlock	0.29%	1.53
Oakgate Plant Centre, Ellerdine Heath, Telford	0.10%	0.51
Roden Nurseries, Roden Lane, Roden, Telford	0.08%	0.44
Shawbirch	0.04%	0.22
Sub-Total	**0.53%**	**2.75**
3. Shrewsbury South		
Bayton Hill	0.04%	0.20
Church Stretton	1.08%	5.63
Craven Arms	0.19%	0.99
Dobbies Garden World, Hereford Road, Bayston Hil	0.79%	4.13
Ludlow	1.04%	5.42
Sub-Total	**3.13%**	**16.37**
4. Shrewsbury West		
Barncroft Nurseries, Olden Lane, Shrewsbury	0.00%	0.02
Bishops Castle	0.38%	2.01
Sub-Total	**0.39%**	**2.03**
5. Shrewsbury Central West		
Bicton Heath	0.02%	0.08
Focus, Meole Brace Retail Park, Shrewsbury	0.50%	2.59
Meole Brace Retail Park, Shrewsbury	10.41%	54.50
Radbrook Green	0.04%	0.23
Shrewsbury	49.32%	258.12
Sub-Total	**60.29%**	**315.51**
6. Shrewsbury Central East		
B&Q Mini Warehouse, Featherbed Lane, Shrewsbury	1.55%	8.14
Charlie's, Brixton Way, Shrewsbury	0.04%	0.20
Harlescott	0.26%	1.37
Homebase, Sundorne Retail Park, Shrewsbury	0.32%	1.69
Lancaster Retail Park, Shrewsbury	0.44%	2.31
Percy Thrower's Gardening & Leisure, Oteley Road, Shrewsbury	0.77%	4.04
Sundorne Retail Park, Shrewsbury	0.73%	3.84
Wickes, Kendal Road, Shrewsbury	0.25%	1.30
Sub-Total	**4.37%**	**22.88**
SUB TOTAL	**73.50%**	**384.68**
OUTSIDE STUDY AREA		
Birmingham City Council		
Birmingham City Centre	0.32%	1.66
Sub-Total	**0.32%**	**1.66**
Cheshire East Council		
Bridgemere Garden Centre, Bridgemere, Cheshire	0.17%	0.91
Sub-Total	**0.17%**	**0.91**
Cheshire West & Chester Council		
Cheshire Oaks, Ellesmere Port	0.09%	0.47
Chester	0.82%	4.29
Sub-Total	**0.91%**	**4.76**
Dudley Metropolitan Borough Council		
Dudley	0.03%	0.14
Merry Hill Shopping Centre, Dudley	0.04%	0.20
Sub-Total	**0.06%**	**0.34**
Herefordshire Council		
Hereford	0.45%	2.36
Sub-Total	**0.45%**	**2.36**
Manchester City Council		
Manchester	0.11%	0.59
Sub-Total	**0.11%**	**0.59**
Powys County Council		
Derwen Garden Centre & Farm Shop, Guilsfield, Welshpool	0.08%	0.41
Newtown	0.14%	0.74
Welshpool	0.19%	1.02
Sub-Total	**0.41%**	**2.17**
Sandwell Metropolitan Borough Council		
Wednesbury	0.07%	0.37
Sub-Total	**0.07%**	**0.37**
Shropshire Council		
Bridgnorth	0.11%	0.60
Broseley	0.01%	0.04
Ellesmere	0.05%	0.24
Homebase, Penda Retail Park, Oswestry	0.06%	0.34
Homebase, Waymills Road, Whitchurch	0.10%	0.51
Ludlow Home Care, Ludford Bridge, Ludlow	0.03%	0.18
Moreton Park Garden Centre, Gledrid, Wrexham	0.06%	0.30
Oswestry	1.38%	7.21

ZONE	Comparison Market Share	Total Turnover (2012) £m
Whitchurch	1.77%	9.25
Sub-Total	**3.57%**	**18.66**
Stafford Borough Council		
Homebase, Greyfriars Business Park, Stafford	0.01%	0.04
Stafford	0.18%	0.92
Wickes, Madford Retail Park, Stafford	0.01%	0.04
Sub-Total	**0.19%**	**1.00**
Stoke-on-Trent City Council		
Hanley	0.43%	2.23
Sub-Total	**0.43%**	**2.23**
Telford & Wrekin Borough Council		
B&Q Supercentre, Telford Bridge Retail Park, Telforc	0.19%	1.02
Focus, Audley Avenue, Newport	0.02%	0.08
Homebase, Wrekin Retail Park, Telford	0.14%	0.73
Mere Park Garden Centre, Stafford Road, Newport	0.02%	0.13
Newport	0.19%	0.98
Telford	6.14%	32.12
Telford Bridge Retail Park, Telford	0.53%	2.78
Telford Forge Retail Park, Telford	0.34%	1.81
Wellington	1.05%	5.50
Wrekin Retail Park, Telford	0.55%	2.87
Wyevale Garden Centres, Station Road, Donnington, Telford	0.06%	0.32
Sub-Total	**9.23%**	**48.32**
Walsall Council		
IKEA, Park Lane, Wednesbury	0.09%	0.47
Walsall	0.08%	0.40
Sub-Total	**0.17%**	**0.88**
Wolverhampton City Council		
B&Q Warehouse, Spring Vale Business Park, Wolverhampton	0.01%	0.05
Wolverhampton	0.11%	0.56
Sub-Total	**0.12%**	**0.61**
Wrexham County Borough Council		
B&Q Mini Warehouse, Berse Road, Wrexham	0.01%	0.04
Wrexham	0.51%	2.64
Sub-Total	**0.51%**	**2.68**
Wyre Forest District Council		
Kidderminster	0.28%	1.48
Sub-Total	**0.28%**	**1.48**
Other		
Other	1.66%	8.70
Sub-Total	**1.66%**	**8.70**
SUB TOTAL	**18.67%**	**97.72**
Internet / mail order / catalogue	7.84%	41.01
TOTAL	**100%**	**523.41**

Table 12: Special Forms of Trading (Comparison)

SFT Market Share	Zone						Total (£)
	1	2	3	4	5	6	
2012	10.03	6.64	5.07	7.02	7.02	5.28	**41.05**
2016	12.41	8.22	6.28	8.69	8.69	6.54	**50.83**
2021	14.99	9.93	7.58	10.49	10.49	7.90	**61.39**
2026	15.18	10.06	7.68	10.62	10.63	8.00	**62.17**

	SFT Growth (£m)
2012-2016	9.77
2016-2021	10.56
2021-2026	0.78

Table 13: Planning Commitments (Comparison)

	Application Ref	Gross Floorspace	Net floorspace	Turnover per sq.m	Total Turnover	Turnover from Study Area	Total Turnover
		sq.m	sq.m	£	£m	%	£m
New Riverside Scheme	12/00409/EIA	25204	17642.8	5000	88.21	85%	74.98
Tesco, Battlefield	11/03609/FUL	1919	660	10623	7.01	90%	6.31
Sainsburys, Meole Brace	10/04061/FUL	1687	732	5826	4.26	90%	3.84
Waitrose, Otley Road	12/01946/FUL	3902	390	6164	2.40	90%	2.16
7 'local centre' units (part of Waitrose Scheme)	12/01946/FUL	684	342	3000	1.03	95%	0.97
Marks and Spencer, Meole Brace Retail Park (current Blockbuster/Carphone Warehouse unit)	13/01592/OUT	1200	240	8120	1.95	90%	1.75
Retail Unit, Meole Brace (replacement for Carphone Warehouse)	13/04101/FUL	116	81	5000	0.41	90%	0.36
Extension to Unit 1 Meole Brace	13/00574/FUL		2601	3000	7.80	90%	7.02
Installation of mezzanine Building 1 (Former Homebase) Sundorne Retail Park Arlington Way	13/03073/FUL	3239	3035	3000	9.11	90%	8.19
Junction of Barker Street and Claremont Street	09/02760/F	387	271	5000	1.36	95%	1.29
Mezzanine Floor, Currys, Unit 4, Meole Brace Retail Park	10/00057/F	618	578	6241	3.61	90%	3.25
Mezzanine Floor, Unit 8, Meole Brace Retail Park	08/1280/VAR	2950	2360	3000	7.08	90%	6.37
Mezzanine Floor, Building 4, Unit 1, Sundorne Retail Park	08/00660/F	648	454	3000	1.36	90%	1.22
Dobbies Garden Centre, Bayston	10/02566/FUL	755	529	3000	1.59	90%	1.43
Implemented Floorspace, Units 1 and 2 Sundorne Retail Park	07/01144/F	2506	2004	3000	6.01	90%	5.41
Total			**31919.8**		**143.19**		**124.58**

Table 14: Capacity (Comparison)

		2012	2016	2021	2026		Incremental Growth 2012-2016	2016-2021	2021-2026	2012-2026
	Total population and expenditure									
A	Total Population	187,541	191,248	196,157	200,394		3,707	4,909	4,237	12,853
B	Total Expenditure £m	482.31	545.80	624.69	769.85		63.49	78.88	145.17	287.54
C	Retained Expenditure %	79.8%	79.8%	82.3%	82.3%					
D	Retained Expenditure £m	384.7	435.3	514.1	633.6		50.64	78.80	119.47	248.91
	Turnover of Comparison Stores in the Study Area									
E	Total Comparison Retail Turnover of Stores £m	384.7	402.2	453.1	549.9		17.57	50.88	96.77	165.22
	Commitments									
F	Comparison Retail Commitments £m	0.00	130.27	140.34	151.18		130.27	10.07	10.85	151.18
	Special Forms of Trading									
G	Growth in SFT	0.00	9.77	10.56	0.78		9.77	10.56	0.78	21.11
H	**Initial Residual Comparison Retail Expenditure £m**	**0.00**	**-106.98**	**-89.91**	**-68.27**		**-106.98**	**17.07**	**21.64**	**-68.27**
	Inflow of Expenditure from Outside the Stdy Area									
I	Inflow (%)	5.0%	5.0%	7.0%	7.0%					
J	Inflow £m	19.23	21.77	35.99	44.35		2.53	14.22	8.36	25.12
	SUMMARY									
K	Initial Residual Comparison Retail Expenditure £m						-106.98	17.07	21.64	-68.27
L	Growth in Inflow £m						2.53	14.22	8.36	25.12
M	Allowance for current stores over-trading									
N	**FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m**						**-104.45**	**31.29**	**30.00**	**-43.16**
	Conversion to floorspace need									
O	Turnover per sq m (assumed)						5,228	5,632	6,068	
P	*Floorspace Requirement for study area (sq.m net)*						**-19,977**	**5,556**	**4,944**	**-9,477**
Q	Floorspace Requirement for study area (sq.m gross)						-28,539	7,937	7,063	-13,539
	Floorspace Requirements for PCA									
R	Turnover of Existing Comparison Facilities £m	338.40	480.14	549.53	677.23					
S	Proportion of Retained Expenditure %	88.0%	88.0%	88.0%	88.0%					
T	*Floorspace Requirement for PCA (sq. m net)*						**-17,574**	**4,888**	**4,349**	**-8,337**
U	Floorspace Requirement for PCA (sq. m net)						-25,105	6,982	6,213	-11,910